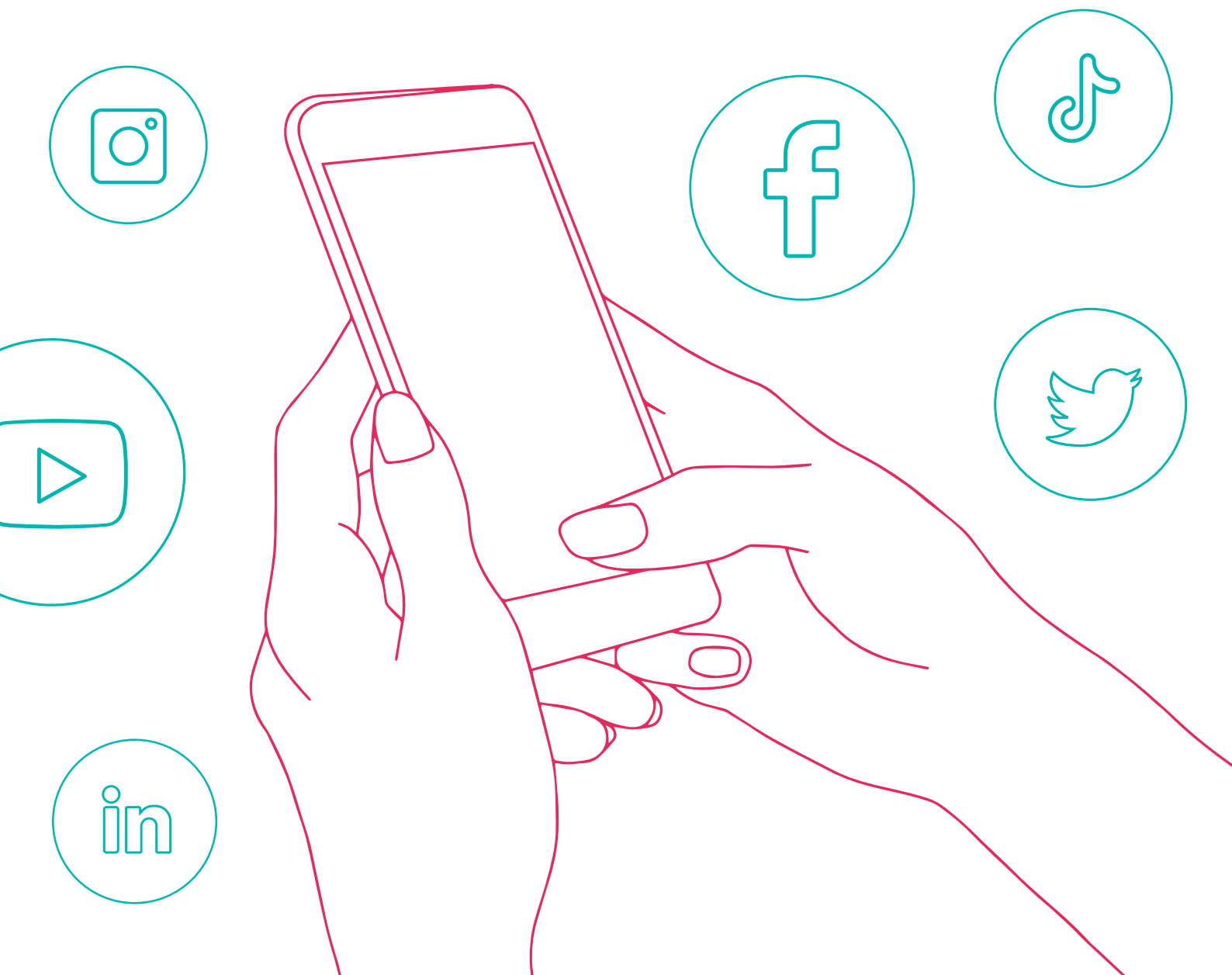


Social Media Census 2020

Australian Social Media Usage in 2020 and
the Change in Behaviour Post COVID-19



Hello and welcome to our F21 Social Media Census!

Undoubtedly, the last few months have been a wild ride for Australia, from the bushfires to COVID-19 and all of the economic uncertainty that has ensued due to these factors — **our worlds, and daily behaviours and habits have been turned upside down.**

At the start of the year, we set out to run the social media census in partnership with the incredible market research company, **Pureprofile**. Our mission was to research the Australian landscape and measure our online behaviours, purchasing patterns, and most important, what our communities want to see and hear from us: the brands that market to them.

We ran our survey in late January, did our data analysis and were ready for release, and then we all know what happened then! **COVID-19 hit** — and online behaviour changed, with eyeballs stuck to our screens for news updates, connecting with our families, and keeping ourselves entertained in lockdown. We felt it wasn't fair to continue on as is and publish our census until we ran an update, and here we are today.

The report you will read through today contains valuable and hands on learnings from 2 census reports, one research survey ran in January, and a follow-up research report ran in June.

In this report, **we uncover insights across the key areas of social media consumption and behaviour patterns across Australians.** From the platform usage & functionality through to where Australians are purchasing, what they are purchasing and what messaging from a brand is most likely to influence their ongoing relationship with that brand.

We hope you find this data useful and it helps you and your brand craft meaningful social media strategies to deeply connect with your customers.



Gina Lednyak

Founder & CEO
L&A Social Media

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ABOUT THE COMPANIES

L&A SOCIAL

L&A Social is Australia's leading independent social media agency. We work across global brands from our Sydney HQ, and have helped hundreds of world renowned brands achieve tangible business results through end-to-end social.

We believe in leaving things better than we found them. For us, this means doing our part to make the world a better place, connecting people with brands that are tailored to their interests, and providing brands with genuine, authentic fans & powerful conversations. We mix our knowledge of the social landscape with your knowledge of your brand to develop a tailored and strategic integrated strategy that hits business objectives.

Pureprofile

Pureprofile is a data and insights business, underpinned by technology. We help brands and media owners identify, connect and engage with more of the people that matter, as part of a mutually beneficial relationship.

By capturing declared, first-party data and the formation of deep consumer profiles, businesses gain the ability to segment, target and engage with their audiences for the purpose of research, marketing and advertising. In exchange, consumers receive value for their data, both as an immediate reward and through the delivery of preferred, more relevant content and personalised experiences.

Top 10 Highlights

- 01 The current COVID-19 crisis has had a significant impact on social media consumption, with time spent on social growing nearly 30%.
- 02 The percentage of Australians active on social media has remained relatively static over the last 6 months: Facebook (used by 89% of Australians), YouTube (62%) and Instagram (46%) are the dominant platforms.
- 03 The amount of time Australians spend on social media daily has increased dramatically over the last 6 months.
- 04 Currently, Australians report spending more than an hour a day on the following platforms: YouTube (90 minutes a day on average), Facebook (85 minutes) and Instagram (77 minutes) and TikTok (71 minutes).
- 05 Increased media consumption has not been restricted to the online world as offline television watching also saw a significant increase and now sits at 73 minutes a day on average.
- 06 A majority of Australians are happy with the amount of time they spend on social media (64%, down 1% since January) and think it helps them feel connected (60%, down 1% since January).
- 07 One-in-four Australians (25%, down 10%) say they can't live without social media.
- 08 Australians follow an average of at least 14 brands on social media, 70% of Australians follow at least one brand.
- 09 More than two-in-five Australians used social media to make a purchase in the past 12 months with Facebook being the primary purchase platform.
- 10 The 45% of Australians who report making a purchase via social media in the past 12 months spent an average of \$245 (up from \$226 in January).

The Census Methodology

Pureprofile and L&A Social Media partnered to gather data reflecting the latest social media consumption patterns and trends in Australia including how social media compares to other media platforms. The data was collected using an online survey with a range of respondents across Australia across all demographics.

	JANUARY 2020	JUNE 2020
Methodology	Online survey 27 questions	Online survey 27 questions
Samples	47% Male / 53% Female National in scope Age 18+	43% Male / 57% Female National in scope Age 18+
Fieldwork	Margin of error = +/- 3.2%, 19 times out of 20	Margin of error = +/- 4.1%, 19 times out of 20

Weekly Usage Across All Media Channels (Online & Offline)

The first half of 2020 has seen a dramatic change in the amount of time Australians spend active on social media channels.

Since January 2020, **weekly online channel usage has increased across all major social media platforms** as Australians have complied with the government's 'stay at home' orders in an effort to flatten the curve of the COVID-19 virus.

In addition, to their increased online screen time, **Australians have also been spending more time on the couch with weekly offline television viewing undergoing a similar increase.**

The top four media activities in the average week for Australians are Facebook, YouTube, watching offline TV, and Instagram.

Our study revealed a significant increase since January in the weekly time Australians spent on 10-of-12 different media channels tracked with **YouTube, Facebook** and **Instagram** leading the way.

Television (offline), Twitter and **Snapchat** occupied the next tier of weekly time committed followed by **watching television (online), LinkedIn** and **radio**.

Among the activities which Australians spent the least time on in the average week were **reading the news (online), reading newspapers and/or magazines**.

Reported Weekly Usage (All Media)

Question: In the last week, roughly how long did you spend doing the following activities?

Base: Total Sample, n=621

January 2020

June 2020



Specific Media Activities

(DEMOGRAPHIC HIGHLIGHTS)

The consumption patterns for channels is largely aligned to age demographics.

There were a number of interesting splits in the data related to media activities.

First and foremost, younger Australians (i.e. those 18-35) have moved the bulk of their television viewing online, leaving offline television and its audience of older Australians behind.

Younger Australians have gone the same route with radio, leaving traditional offline broadcast radio behind for the eclectic variety afforded by online streaming services like Spotify and Pandora.

As for newspaper and magazine consumption, males report higher levels of reading newspapers (online or offline) in the average week than females who reported slightly higher levels of magazine consumption.



Offline TV

23% of 18-24 yo report watching none (23% report watching less than 60 minutes)

30% of 55+ yo report watching more than 20 hours

30% of 25-44 yo report watching 1-2 hours per week



Online TV

Roughly 50% of 55+ yo report none

25-34 year olds report watching the highest amount of tv online (30% between 3-10 hours)



Online News

65+ yo report listening to the radio far more than any other age demographic (14% more than 20 hours)

18-24 year olds listen to the radio less than any other demographic



Radio

Males are more likely to read news online than females & the average time spent is 1-2 hours per week

41% of 18-24 year olds report spending no time reading news online



Newspapers

67% of 25-34 yo report reading no newspapers offline

65+ holds the most time reading newspapers with 8% reading 6-10 hours weekly

Males are more likely to read news offline (17% to 10%) than females



Magazines

Females are more likely to spend 1-2 hours reading magazines (10% vs 7% of males)

An average of 60% of people report spending no time reading magazines each week

The Platforms

With a range of social media platforms to choose from, YouTube, Facebook and Instagram are currently the primary platforms being used by a majority of Australians.

Facebook is the number one, most widely used platform amongst Australians with nearly nine-in-ten reporting spending time on it daily/weekly. Not surprisingly, it attracts Australians of all ages.

YouTube is Australia's second most used social media platform with 2-in-3 Australians of all ages consuming its content on a daily/weekly basis.

Instagram, also widely used with 1-in-2 Australians active on the platform, tends to attract a slightly younger audience and skew female.

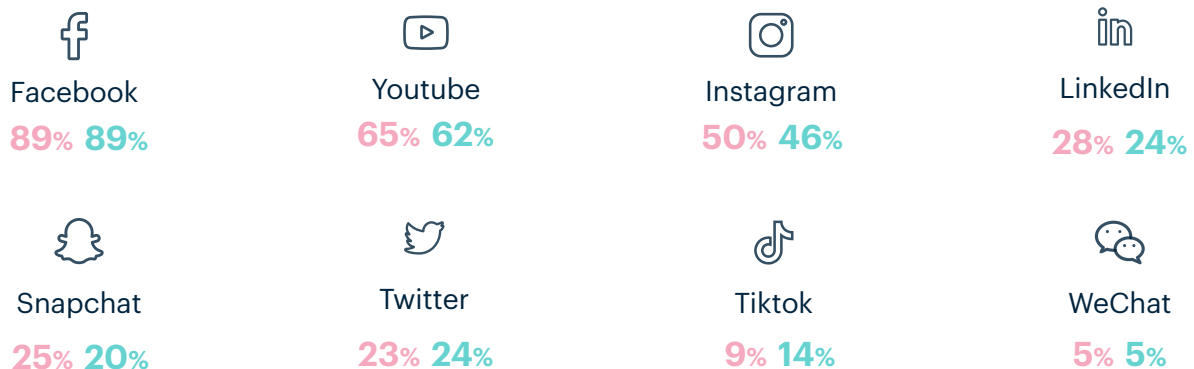
Roughly one-in-four Australians report using **Twitter**, **LinkedIn** and **Snapchat**. Twitter users tend to be under 40 while LinkedIn users fit a 25-50 profile— both have a slightly more male skew. Snapchat users however, skews female and have the youngest age profile of any of the major platforms (Tik Tok excluded).

Social Media Platform Use (% use)

Question: Which social media platforms do you use?

Base: Total Sample, n=621

January 2020 ● June 2020 ●



Facebook, Youtube, and Instagram are the mainstream social media platforms of choice for the majority of Australians.

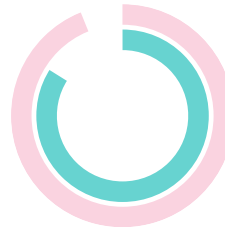
At the same time, significant sub-sets of Australians continue to utilise niche platforms **LinkedIn, Snapchat** and **Twitter**. A notable newcomer over the past six months, **TikTok** has gained traction amongst a growing number of Australians (largely those under 25).

FACEBOOK

Platform penetration: 89% of Australians

Daily time on platform: 85 minutes

Weekly average hours: 9 hours 54 minutes



USAGE BY GENDER

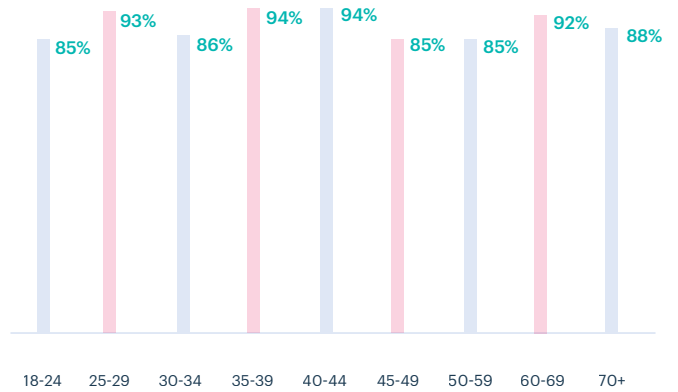
94% females

84% males

USAGE BY STATE



USAGE BY AGE



Instagram

Platform penetration: 50% of Australians

Daily time on platform: 77 minutes

Weekly average hours: 9 hours

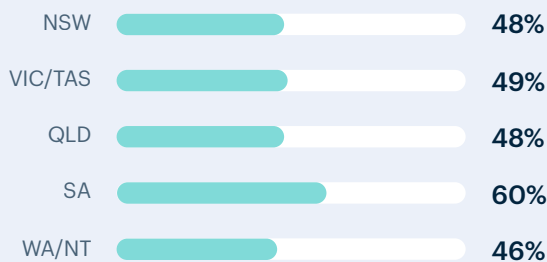


USAGE BY GENDER

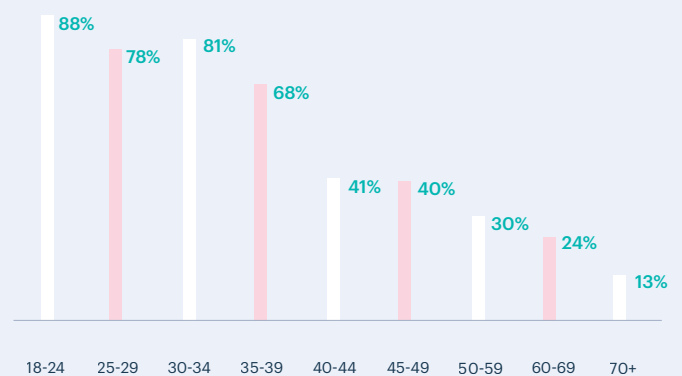
59% females

39% males

USAGE BY STATE



USAGE BY AGE



The profiling data shows that while Facebook's penetration is spread relatively evenly across age sub-groups, Instagram's user base has a slightly younger and more female skew.

twitter

Platform penetration: 23% of Australians

Daily time on platform: 58 minutes

Weekly average hours: 6 hours 48 minutes

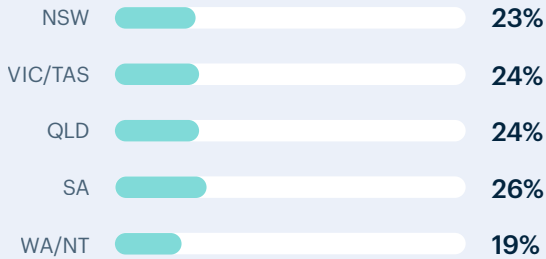


USAGE BY GENDER

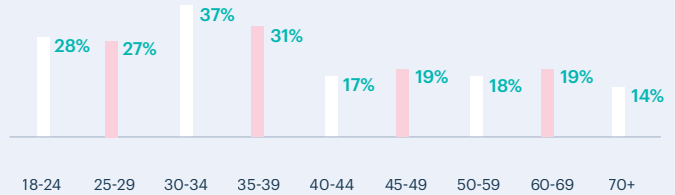
19% females

29% males

USAGE BY STATE



USAGE BY AGE



LinkedIn

Platform penetration: 28% of Australians

Daily time on platform: 38 minutes

Weekly average hours: 4 hours 24 minutes

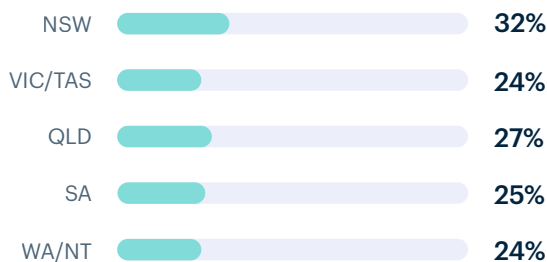


USAGE BY GENDER

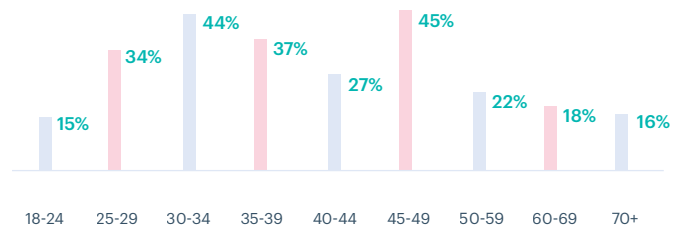
22% females

34% males

USAGE BY STATE



USAGE BY AGE



Though Twitter and LinkedIn have similar male skews in their gender profiles, **Twitter's** age profile has an under 40 focus, while **LinkedIn** has broader appeal among working-age Australians.

SnapChat

Platform penetration: 25% of Australians

Daily time on platform: 57 minutes

Weekly average hours: 6 hours 42 minutes

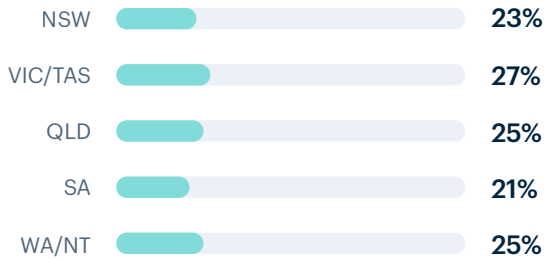


USAGE BY GENDER

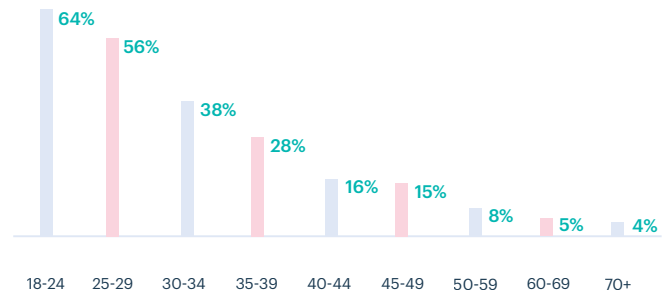
29% females

20% males

USAGE BY STATE



USAGE BY AGE



YouTube

Platform penetration: 65% of Australians

Daily time on platform: 90 minutes

Weekly average hours: 10 hours 30 minutes

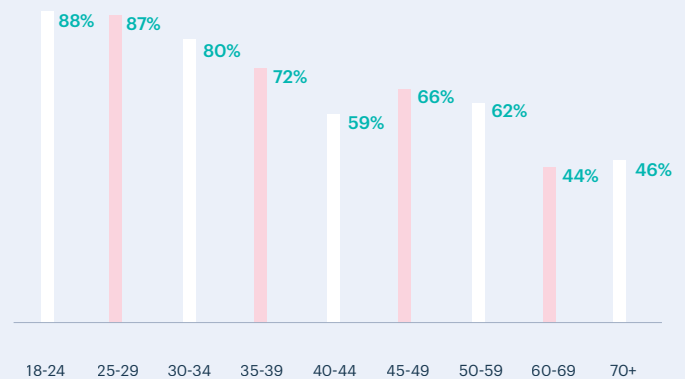
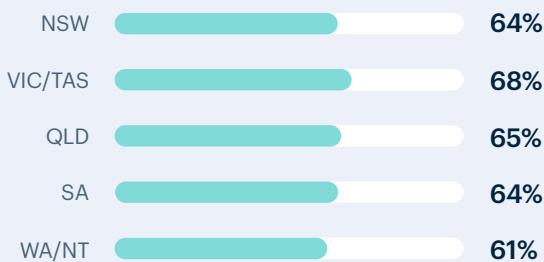


USAGE BY GENDER

62% females

68% males

USAGE BY STATE



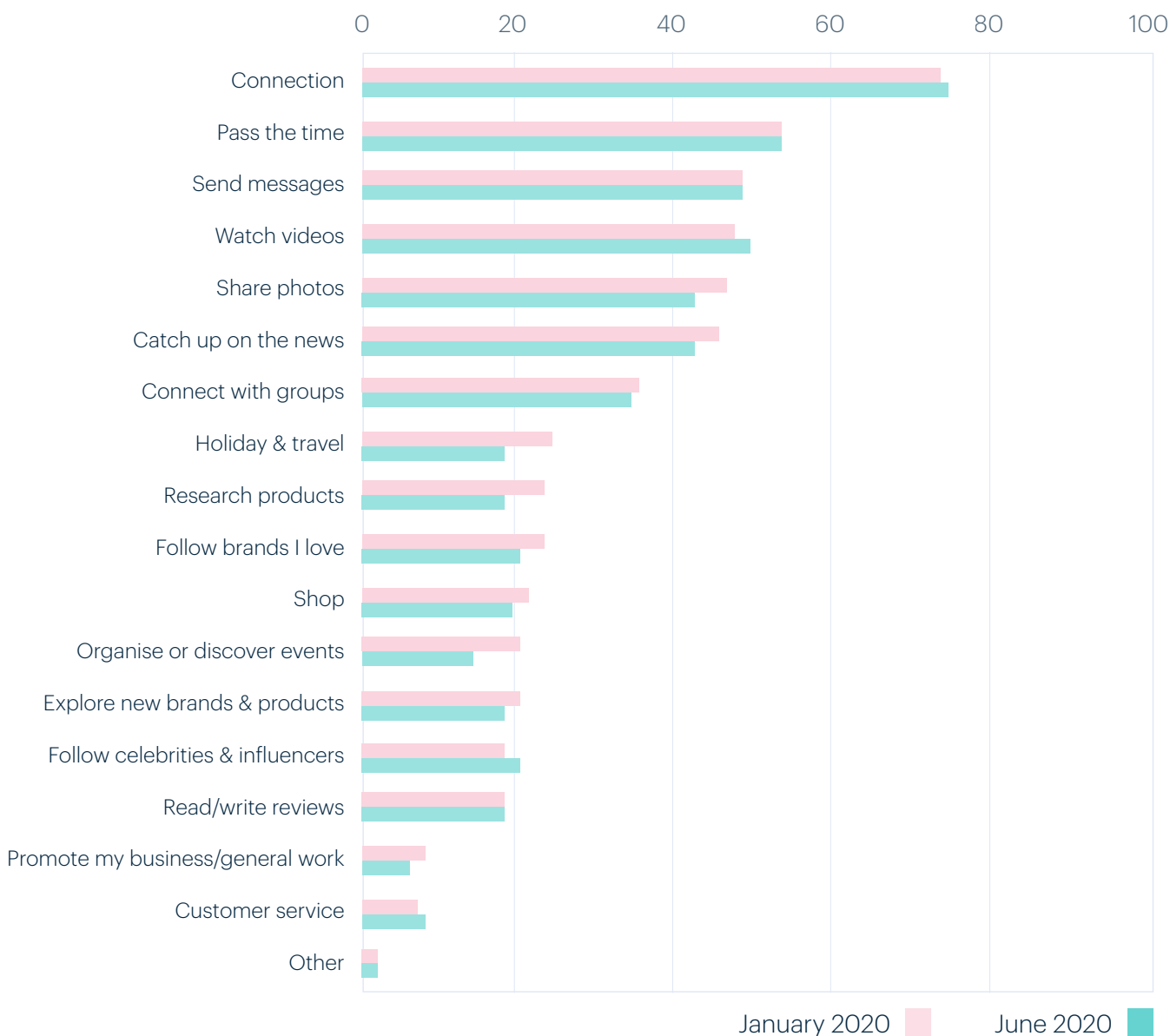
The profiling data on **Snapchat** reveals a user base that is more female than male and skews under 30 years of age. In contrast, **YouTube** users are slightly more male than female and more evenly spread across all age groups.

Why, When and Where We Use Social Media

Connection (with friends, family and groups), sharing (photos, videos and stories) and entertainment (watching videos, catching up on the news or just passing the time) are the main reasons why Australians use social media. Researching products, following brands I love, and shopping are also prominent social media usage activities.

As for the when and where of social media use, Australians access social media at all hours of the day with early and late evening being prime social media time and typically most often do so while in their lounge room/kitchen.

Why We Use Social Media



By Demographics

Not surprisingly, there were some significant age and gender specific differences in why/how Australians use social media.

Females were significantly more likely than males to cite using social media for the following reasons:

To connect with friends and family (81% vs. 66%), **shop or gain shopping inspiration** (25% vs. 11%), **follow brands I know and love** (26% vs. 14%), **follow celebrities and influencers** (20% vs. 11%).

18-24_{yo}

were significantly more likely than any other age group to use social media to **watch videos** (67%) or **follow celebrities and influencers** (30%).

35-44_{yo}

were significantly more likely than any other age group to use social media to **send messages or make calls** (59%), **share photos and videos** (56%), **connect with like-minded people/ community groups** (45%) or **explore new brands** (36%).

25-34_{yo}

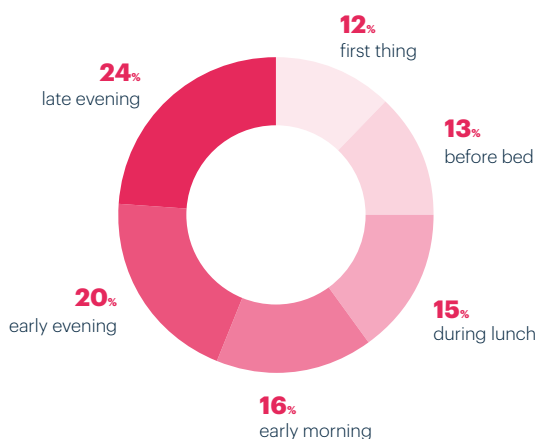
were significantly more likely than any other age group to use social media to **catch up on news and current affairs** (53%).

65_{+yo}

were significantly more likely than any other age group to use social media **to connect with family and friends** (86%).

Time of Day Usage

Question: When are you most active on social media?

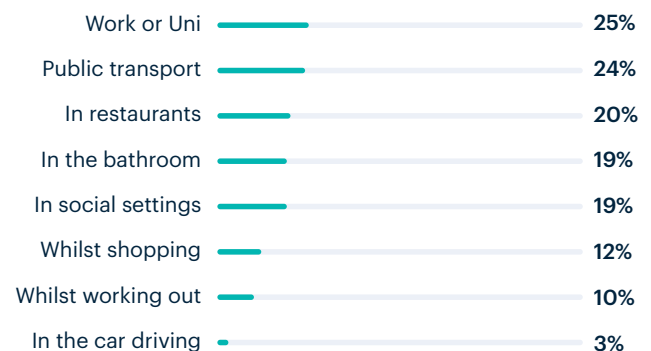


While **early late evening** are prime time for social media, Australians access social media **multiple times throughout the day**.

Top 3 Locations



FOLLOWED BY



Our Attitudes Toward Social Media

Like most things in life there are good and bad sides to social media use.

Our attitudes toward social media continue to evolve and shift as we as a society figure out how we use social media to enhance our lives. Currently, the good outweighs the bad, with social media helping us feel more connected to others.



The Good

A majority of Australians are **happy with the amount of time they spend on social media** (64%, down 1% since January) and think it **helps them feel connected** (60%, down 1% since January).

One-in-two Australians (50%, up 1%) think **social media improves their relationships** because they keep in better touch with friends and family.

More than 2 in 5 say they **consume a majority of their news via social media** (43%) and that it **inspires them to try new things** (43% down 2% since January).



The Bad

Roughly one-in-five of Australians (25%, down 10%) say they **can't live without social media** and 35% (up 1% since January) say **social media makes them compare themselves to others**.

One-in-four Australians (27%, down 3%) **feel they are addicted to social media**.

One-in-four Australians (27%, up 5%) say they **see friends and family less often because they connect to them via social media**.

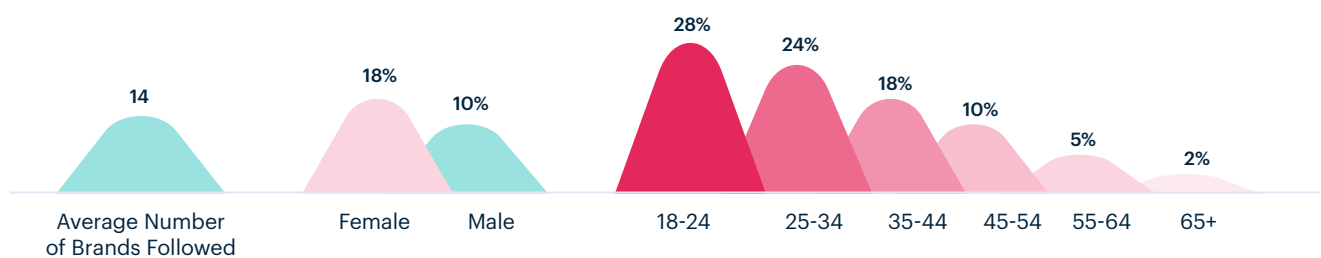
Brand Interaction on Social Media

Australians follow an average of 14 brands on social media — a number that increases amongst the younger demographics.

The reasons why we follow brands has changes from January to June, with **brand product & information losing first place to discounts & promotions**. With the currently unstable economy Australians are increasingly looking to social media to be the first to know about promotions.

What matters most to Australians about the brands they follow are the **brand's content and values** and **how engaged they feel with the brand**, with 43% of Australians saying that following a brand on social media helps them trust the brand more.

As for disengaging, the two main reasons Australians unfollow brands are that **they 'move on/ lose interest'** or because **brands posts appear spammy**.



Why We Follow Brands on Social Media

While brand & product information was first in January, this is now replaced with discount and promotions given an unstable economy, likewise topical commentary and social / political stance is up correlating to the high rate of political and topical commentary over the past months.



Australians are fairly transactional when it comes to following brands on social media. The top three reasons given for following brands were for **access to discounts promotions, brand product info and updates, and inspiration and ideas**.

January 2020 ● June 2020 ●

What Matters Most to Us When Following a Brand?

Content, values and engagement are the three drivers that matter most to brand followers on social media.

January 2020 ● June 2020 ●



Content

81% 75%

say they are more likely to follow a brand that posts quality content that is relevant to them



Values

72% 66%

of people follow brands that have values they align with



Engagement

71% 62%

of people say they follow brands who entertain them



Presence

51% 54%

say it is important to have a strong social media presence even if they are only available for purchase in store



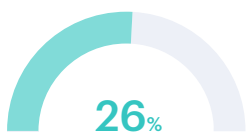
Trust

39% 43%

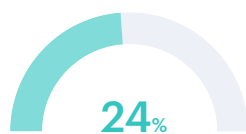
of people say following a brand on social media helps trust them more

Why We Unfollow Brands

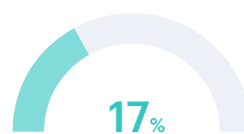
Females 25% were significantly more likely than males 13% to have unfollowed a brand in the past 12 months and 25-39 (31%) were significantly more likely to have unfollowed a brand in the past 12 months than younger or older Australians.



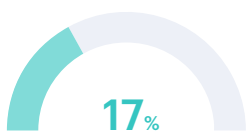
No longer using brand/
lost interest



Too many posts/ too
many ads/ it was spam



Too political/ didn't
match values



Posts were irrelevant/
boring



Other



Lack of interest/
not engaging

Australians can be fickle brand followers: one-in-five report having unfollowed a brand in the past 12 months and females are twice as likely as males to unfollow brands. Moving on/ losing interest in a brand and too many posts/ads are the key 'unfollow' drivers.

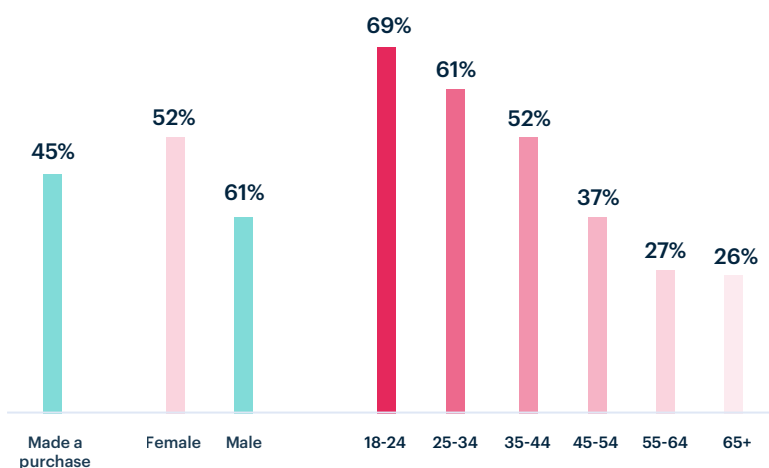
Purchase Behaviour

Two-in-five Australians report having used social media to make a purchase in the past 12 months with females making more purchases than men.

On average, Australians who have made purchases via social media in the past year spent an average of \$245 – an amount that increases with age.

Shipping costs, consumer reviews/ratings and discount codes/sales are the top three purchase decision factors in terms of importance for those making social media purchases.

% of people who made a purchase via social media in the last 12 months

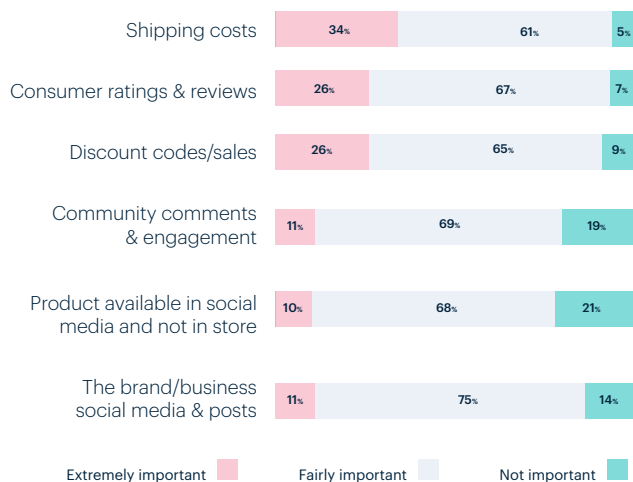


WHAT THEY BOUGHT

Clothing & fashion	39%
Health & wellness products	25%
Beauty & makeup related products	25%
Homewares/household items	24%
Baby/kid related products	14%
Books	14%
Food or beverage	14%
Sports & fitness equipment	13%
Outdoor/adventure equipment	10%
Computers, gaming & electronics	9%
Video games/apps	9%
Jewellery	9%
Event tickets	8%
Movie/music download/streaming	8%

What impacts our purchasing decisions?

Shipping costs, consumer reviews/ratings and discount codes/sales are the top three decision factors in terms of importance when making social media purchases.



AMOUNT SPENT ON GOODS THROUGH SOCIAL MEDIA IN THE LAST 12 MONTHS

Australians who made a purchase in the past 12 months via social media spent an average of \$245. While there were no significant regional differences, males outspent females and the total amount spent increased with age up to retirement.



The New Normal

The COVID-19 pandemic has had a significant and long-term impact on the lives of Australians. Below are the things Australians would like to see be part of the 'New Normal'. Aside from hand sanitising, some of the biggest things Australians would like to keep are flexible work arrangements and more time at home with family.

Hand sanitiser stations in public spaces	61%
Flexible work arrangements	58%
More time spent in the home with family	44%
Contactless delivery	35%
Protective plastic screens in every checkout / cashier counters	35%
Cashless payments on goods and services	32%
More online shopping	32%
Online education	31%
Restrictions on number of people in public spaces	29%
Remote medical consultations	27%
Requirements to wear personal protective gear (e.g. face masks)	13%
None of the above	9%

Final Word

Along with the many changes that Covid-19 has brought, we have seen a shift in our online behaviours, many of which are likely to stick around. We are more active across all media (both traditional and digital) however the increase in social media channels has risen substantially, taking the top four platforms for weekly average time spent online. Brands are holding a much larger share of voice in the issues and values of today and we are increasingly reliant on brands to keep us positive, keep us entertained, and provide value in our daily lives.

As brands, we are now more than ever before able to reach people through social media at nearly all times of day and get direct insight & consumer preference. We have an active community in social media users who want to hear from us & want to be heard by us. We also have the opportunity to see our consumers through to purchase & beyond, ensuring that every step of the way they are met with personalised service & brand tone of voice & connection.

Areas like mental health & wellness will likely grow in importance while we reconfigure our next steps and ensuring relevancy and self awareness in our messaging is more important than ever before.

Social media has played a critical role throughout the last six months in connecting us not just to each other but to the brands, businesses & people of our communities. It's an integral part of how we communicate in our daily routines and it is incredibly exciting to think about how rapidly we are evolving our use of the social media channels to add value & connection in our lives.



Elena Fullerton

L&A Social Media Business Director

Thank you!

**Now more than ever it's important to stand out!
Fancy a coffee and a chat?**

Email us at info@landasocial.com

L&A SOCIAL

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