

OpinionpanelResearch

Social Network Sites and Students:

Monitoring social network websites and the explosive rise of Facebook amongst students

**A White Paper from Opinionpanel Research
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Opinionpanel Research

Opinionpanel is a market research agency dedicated to understanding students before, during and after their time at university.

We recruit specialist panels annually with UCAS and now run the UK's only large scale research platform in this market; over 70,000 applicants, students and graduates with verified academic 'ac.uk' email addresses and detailed profiles.

Social Network Sites

As owners of the largest research panel of students in the country, we pride ourselves on keeping up to date with what's on the student radar.

We've been monitoring the use of social network sites over the last year and, in particular, the explosive rise of Facebook and our research can now provide insight into how these social network sites are used by students which, in turn, allows for more effective communications.

In the UK, social network sites – in particular Facebook, MySpace and Bebo – are now all in the top 10 most visited websites amongst the general population, as shown in the table below.

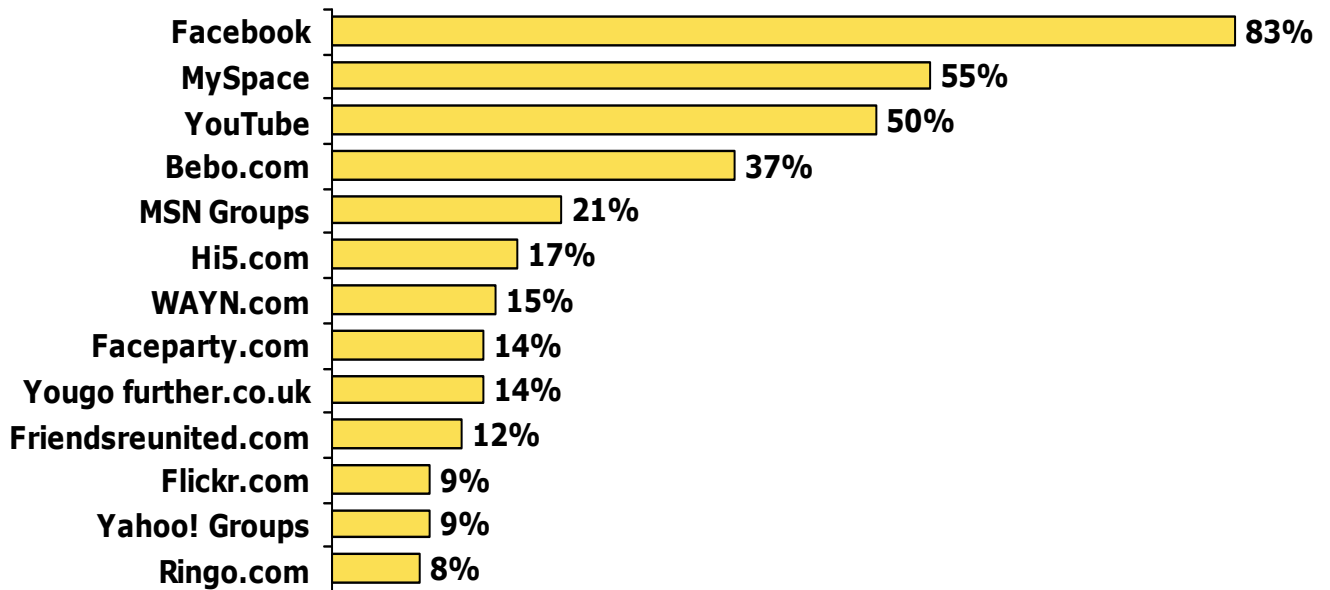
Table 1: Most popular websites based on UK Internet usage for September 2007, ranked by market share of visits across all Hitwise industries

<u>Rank</u>	<u>Website</u>	<u>Market Share</u>
1.	www.google.co.uk	7.47%
2.	www.ebay.co.uk	2.62%
3.	mail.live.com	1.92%
4.	www.google.com	1.73%
5.	www.facebook.com	1.69%
6.	www.hotmail.com	1.69%
7.	uk.msn.com	1.51%
8.	www.bebo.com	1.46%
9.	www.myspace.com	1.2%
10.	news.bbc.co.uk	1.03%
11.	www.youtube.com	0.94%
12.	uk.mail.yahoo.com	0.88%
13.	www.bbc.co.uk	0.84%

Source: Hitwise 2007

It has been reported that a fifth of UK adults are signed up to Facebook. However, our own research shows that over *four fifths* of UK undergraduate students are currently signed up to Facebook.

Chart 1: Sites UK students were signed up to – October 2007



Question: Which of these sites have you signed up to?
Source: Opinionpanel Research 2007

Most students are signed up to several different networking websites, including social networks, photo sharing and IM groups. 90% are signed up to MySpace, Facebook or Bebo.

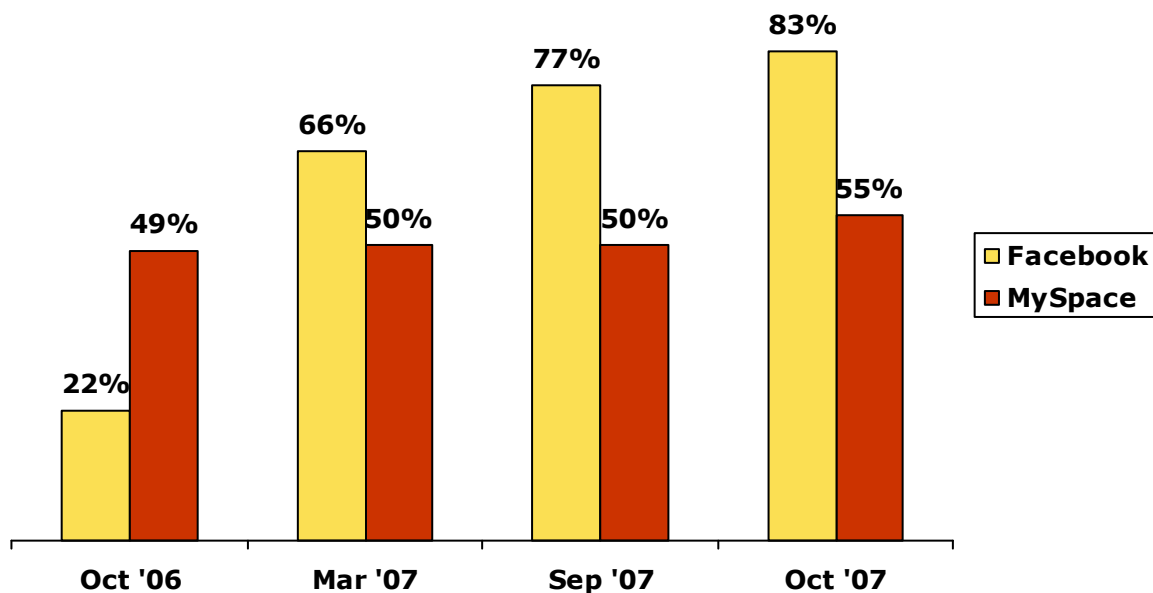
Half are signed up to *both* MySpace and Facebook. Just 5% of students aren't signed up to any internet sites that allow you to network, chat or swap photos.

Over the last year membership of MySpace amongst students has remained static at 50% whilst the proportion signed up to Facebook has grown from 22% to 83%. Once the membership of Facebook opened up to all internet users in September 2006 it really spread fast amongst UK students.

This emphasises the importance of two elements of marketing: the power of word of mouth and influencers.

If the early adopters connect with a site and become its advocates they will bring along those within their sphere of influence. Membership of Facebook mushroomed as different circles of influence became aware of it, joined the network, and then discovered other people from other groups were also involved. This created overlap between groups and even further awareness among those further down the influence chain.

Chart 2: The rise of Facebook amongst UK students

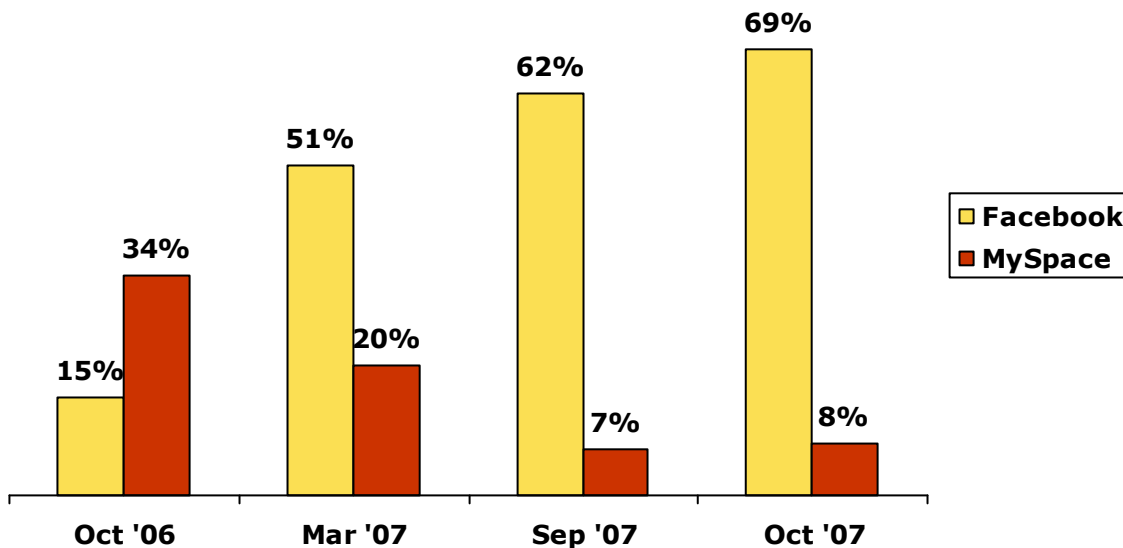


Question: Which of these sites have you signed up to?
Source: Opinionpanel Research 2006/07

The success of Facebook can be attributed to students – they are its foundation audience. They tend to be bright and sociable and are frequently acknowledged to be key opinion formers and influencers. However, while students do form a close-knit community, they are not an island. They, like all communities, need the oxygen of wider society. Once Facebook was opened beyond the universities it was like fanning the flames and this is why Facebook saw such an explosive growth.

It is important to look not just at sign-ups but at active users. When asked which sites students have been on in the last month and which they are planning to use most in the next year, Facebook is the clear winner. Eight in ten have been on Facebook in the last month whereas half that (four in ten) have been on MySpace. Facebook will be used most in the next year and as shown below is the preferred site.

Chart 3: Preferred site



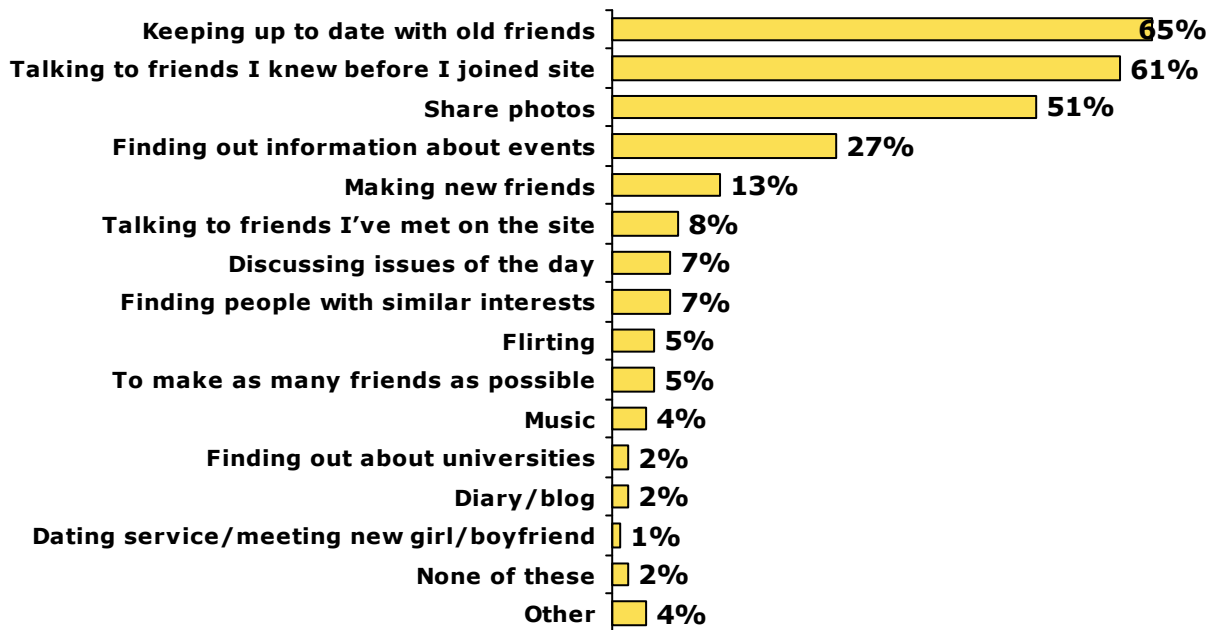
Question: Which of these sites do you prefer?

Source: Opinionpanel Research 2006/07

The reason students love Facebook is because it is easy to use; the layout is clear, the interface intuitive, identifying contacts is simple.

As shown in Chart 4 (below) Facebook is essentially about keeping in contact with old and current friends. This is possible because the service has reached a critical mass – a tipping point – where such a high proportion of students are members its possible for most to claim “all my friends are there”. Only a small minority use Facebook for making new friends or flirting. Facebook is, therefore, more akin to a virtual, local coffee bar than a virtual night club.

Chart 4: What students use Facebook for



Question: What do you mainly use Facebook for?

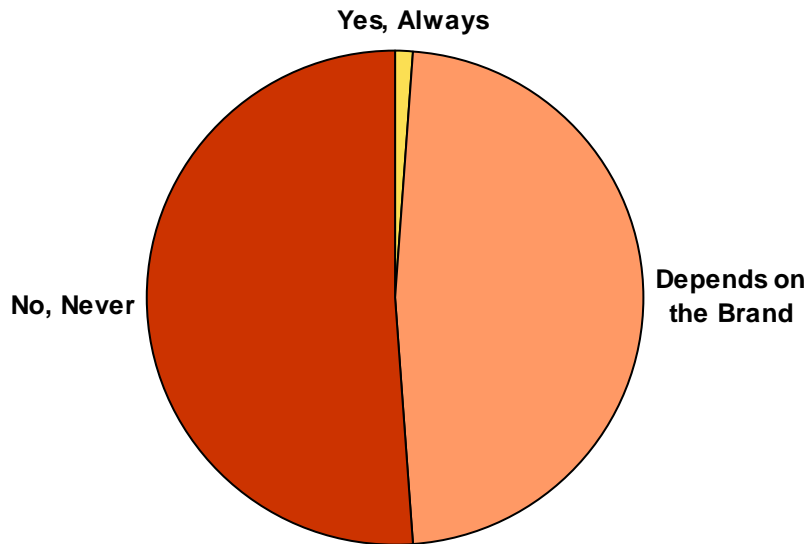
Source: Opinionpanel Research 2007

And this translates to brands as well. If students are going to be “friends” with brands, link to brands pages or join their groups it tends to be ones that they already relate to and identify with; brands that already mean something to them.

Over half of both Facebook and MySpace student users say they would never accept a friendship from a brand. Those that say it “depends on the brand” say it is brands they already know and use or else local companies who they would agree to being friends with.

Users are conscious that their friends and group memberships are listed for public view, so they are keen to have only “cool” ones - or at least ones that reflect their personality. Users wear their other friends and groups like badges, helping to describe or signpost who they are. It reminds one of the motto ‘you can judge a person by the company they keep’. We asked students which brands they would be ‘friends’ with and only a relatively small group of very cool brands made the cut.

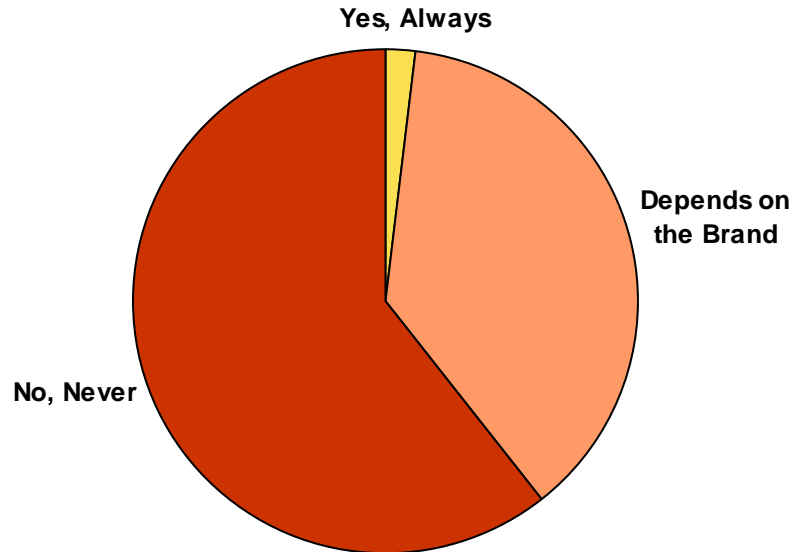
Chart 5: Brands students would be friends with through Facebook: Sony, Volkswagen, H&M, Boots, Animal, Gap, Adidas, All Saints, Fair-trade Brands, Orange, Coca-cola, Cadbury’s, O2, Apple, Snorg T-shirts, Innocent Smoothies, Quiksilver, Microsoft, Samsung, Toshiba.



Question: If a brand invited you to be their friend on Facebook would you accept?

Source: Opinionpanel Research 2007

Chart 6: Brands Students would communicate with through *MySpace*: Volkswagen, H&M, Animal, GAP, Accessorize, Criminal Damage, Lowlife, Vans, Atticus, Fair Trade Brands, Ferrari, Lamborghini, Canon, McLaren.



Question: If a brand invited you to be their friend on *MySpace* would you accept?

Source: Opinionpanel Research 2007

Well known brands that students say they would be friends with include: Apple, Cadbury, H&M, Innocent Smoothies, Sony, Sony Ericsson and Topshop. What these brands all have in common is that they transcend the normal consumer relationship in some way. They have an emotional hold over their customers that inspires a different level of loyalty.

People are happy to be associated with these brands as their friendship gives you a small insight into their lives; whether it is their taste in fashion, their need to have the latest electronic gadget or their environmentally friendly lifestyle. But these friendships don't just exist in the virtual world. Why would someone be a friend of Cadbury's unless they already had some brand loyalty? Remember it is about existing friendships, not making new friends.

The research we've done already is helpful to brands trying to understand how best to appeal to students and young people on social network sites. The market continues to move at a rapid pace; Facebook only recently introduced Facebook Pages, which offer distinct, customized profiles designed for businesses, bands and celebrities to represent themselves on Facebook and connect with people who like their brand. Opinionpanel will continue to monitor the use of social network sites and whatever comes after them amongst students.

Methodology

There is a good deal of data about usage of social network sites in the public domain but very little about specific target groups, such as students or about *why* and *how* people use these sites.

Opinionpanel wanted to investigate these areas and has conducted its own online research with students. Opinionpanel designed the questions that have been used on each of the waves of research. As well as closed questions several open questions have been asked to enable a more exploratory element to the research. All scripting, fieldwork, coding, tables and project management has been carried out by Opinionpanel.

Four waves of research have been conducted to date with 3291 students in total. For each wave, quotas, and if necessary weights, have been used to ensure the sample is representative of full time undergraduates at HEIs in the UK in terms of university type (Russell Group, other Old universities, New universities, other HEIs), year group (1, 2, 3+), and gender. Targets for the quotas & Weights were acquired using data supplied by the Higher Education Statistics Agency (HESA) [based on their Student Record 2004/5].

Fieldwork dates:

Oct 06 – 4th to 5th October 2006;
March 07 – 21st to 23rd November 2007;
Sept 07 – 5th to 9th September 2007;
Oct 07 – 22nd to 23rd October 2007.

All panellists have verified ac.uk email address and receive a £1 incentive for each survey they take part in. The research is MRS Code of Conduct compliant. Opinionpanel does not sell, advertise or market to panellists. All research is anonymous and confidential.

More about Opinionpanel Research

Opinionpanel is the fully independent market research company that owns and operates **The Applicant Panel**, **The Student Panel** and **The Graduate Panel**; with over 70,000 members we cover those critical, transformative years before, during and after life as a student. We provide clients with genuinely valid and representative samples. All our research is anonymous, confidential and in line with the Market Research Society (MRS) Code of Conduct. We are MRS Company Partners. We offer provide clients with a choice of full-service research, field-and-tabs, or sample-only services.

How we recruit our panels

For the last three years panellists have been recruited by email invitation sent by UCAS (Universities and Colleges Admissions Service). UCAS is the UK's central body for handling undergraduate applications and is therefore able to invite almost the whole of each starting cohort. This means there is very little systematic bias in the panel. All respondents have verified *ac.uk* academic email addresses which means only bona fide students take part, almost eliminating the problem of participants with multiple identities – something that plagues many of the consumer panels available. All members of **The Graduate Panel** are former members of **The Student Panel**. All members of **The Applicant Panel** are recruited by UCAS. Secure identity is central to our processes.

What's in it for our panellists?

Panellists get a minimum of £1 credit in Amazon Gift Certificates for completing each questionnaire. Long questionnaires are rewarded with additional Amazon incentives and / or prize draws. Panellists get £10 in credits for joining. Gift certificates are redeemed at £25. Panellists also get periodic feedback on the social and topical issues we cover in our questionnaires. Panellists must always be invited to take part in surveys which means client quotas or Opinionpanel rules such as 'least recent participation' are the basis for sample selection.

Who we work with

Over the past few years we have worked with many of the leading brands and agencies involved in student market plus much of the UK's Higher Education establishment. Our clients include brands such as *The Guardian*, NatWest and Red Bull; market research agencies such as TNS,

ICM and Ipsos MORI and Higher Education organizations such as the Higher Education Policy Institute (HEPI), Higher Education Funding Council for England (HEFCE), the Student Loans Company plus around 40 UK universities

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