TRENDS

April 19, 2007

Social Technographics®

by Charlene Li

FORRESTER® Making Leaders Successful Every Day

Includes data from Consumer Technographics®, Client Choice topic

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Social Technographics®

Mapping Participation In Activities Forms The Foundation Of A Social Strategy

by Charlene Li
with Josh Bernoff, Remy Fiorentino, and Sarah Glass

EXECUTIVE SUMMARY

Many companies approach Social Computing as a list of technologies to be deployed as needed — a blog here, a podcast there — to achieve a marketing goal. But a more coherent approach is to start with your target audience and determine what kind of relationship you want to build with them, based on what they are ready for. Forrester categorizes Social Computing behaviors into a ladder with six levels of participation; we use the term Social Technographics® to describe a population according to its participation in these levels. Brands, Web sites, and any other companies pursuing social technologies should analyze their customers' Social Technographics first and then create a social strategy based on this profile.

TABLE OF CONTENTS

2 **User Participation Defines Social Technographics**

Grouping Consumers By How They Participate

9 **Understand Your Social Technographics Profile**

Social Technographics Profiles Vary By Age

Using Social Technographics For Sites And Brands

RECOMMENDATIONS

13 **Start With A Participation Vision**

14 **Supplemental Material**

NOTES & RESOURCES

Forrester surveyed 4,475 US adults in December 2006 and 4,556 youth in October 2006 and to learn about their use of Social Computing technology adoption.

Related Research Documents

"Consumers' Behavior Online: A Deep Dive"
January 4, 2007, Market Overview

"Organic Branding"
December 28, 2006, Best Practices

"Social Computing"
February 13, 2006, Forrester Big Idea

TARGET AUDIENCE

Interactive marketing professional

RESEARCH CATALYST

Clients selected this topic for Client Choice research.

USER PARTICIPATION DEFINES SOCIAL TECHNOGRAPHICS

One year ago, Forrester introduced the idea of Social Computing, which we define as:[1]

> *A social structure in which technology puts power in communities, not institutions.*

These technologies have seen a rapid adoption — 22% of adults now read blogs at least monthly, and 19% are members of a social networking site (see Figure 1-1). Even more amazingly, almost one-third of all youth publish a blog at least weekly, and 41% of youth visit a social networking site *daily* (see Figure 1-2).

But while the growing numbers are interesting, they don't give companies an idea of which technologies, if any, they should use for marketing purposes. Based on our experience, many companies don't know where to begin when it comes to Social Computing. Why?

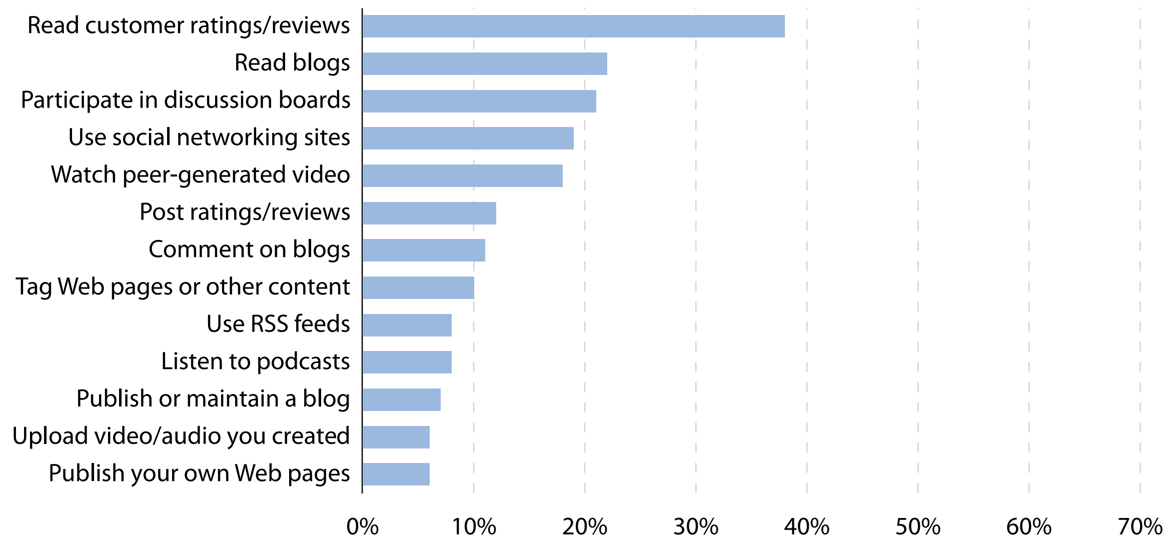
- **They don't know how their customers use social technologies.** The question of how many online consumers read blogs or use social networks is giving way to questions of how many of "my customers" are engaged in Social Computing. More importantly, marketers lack an understanding of which factors drive the adoption of a new Social Computing method: What motivates a user to create a blog, join a social network, or publish a video on YouTube?

- **Inexperience with what works, when, and where.** User-generated content sounds like a great idea — until you have to actually implement it. Marketers don't yet have enough experience to know which technologies and approaches work for different marketing goals and audiences. For example, Butterfinger's contest on YouTube garnered just 59 submissions but significant publicity and awareness — so was it a success?[2]

- **Just when you've mastered the technologies, something new comes along.** Even as marketers begin to figure out what a blog or YouTube can be used for, new technologies like widgets or companies like Twitter emerge. A company's Social Computing strategy needs to be flexible enough to incorporate these innovations — or be able to decide quickly that these bleeding edge ideas can safely be ignored for the time being.

Figure 1 Social Computing Adoption Makes Gains With Adults, Becomes Mainstream With Youth

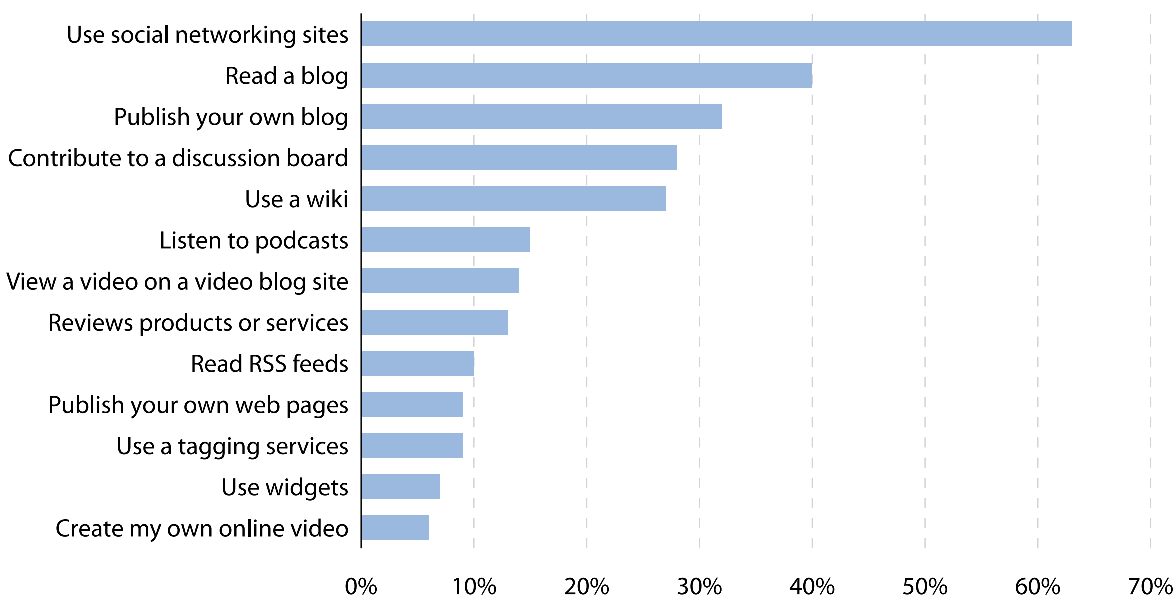
1-1 **"Do you do the following activities at least monthly?"**



Base: US online consumers

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

1-2 **"Do you do the following activities at least weekly?"**



Base: US youth online consumers, 12-21 years old

Source: Forrester's NACTAS Q4 2006 Youth Media & Marketing And Finance Online Survey

42057

Source: Forrester Research, Inc.

Grouping Consumers By How They Participate

To understand Social Computing adoption, we benchmark consumers by their level of participation in Social Computing behaviors. We call this method Social Technographics, since it extends the idea of Technographics — analysis of consumers' approach to technology — to the Social Computing world. This benchmarking method takes into account current Social Computing technologies like blogs and social networks but is also flexible enough to incorporate new technologies as well. The key: understanding how consumers approach these technologies, not just which ones they use.

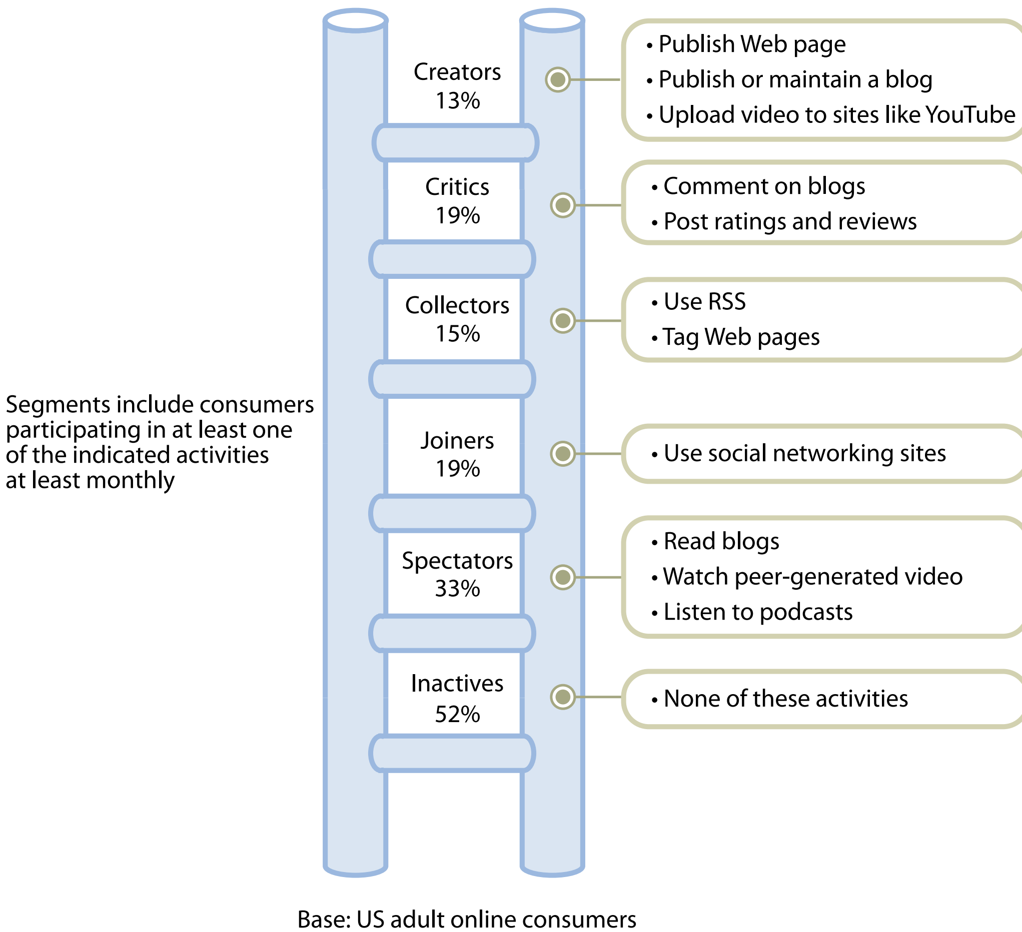
Our analysis examines a ladder of six increasing levels of a participation in social technologies (see Figure 2). Participation at one level may or may not overlap with participation at other levels. Starting from the top with the most sophisticated category, the six rungs on the Social Technographics ladder are:

- **Creators.** At the top of the ladder are Creators — online consumers who publish blogs, maintain Web pages, or upload videos to sites like YouTube at least once per month. Creators, an elite group, include just 13% of the adult online population. Creators are generally young — the average age of adult users is 39 — but are evenly split between men and women (see Figure 3). Their participation in creation activities is varied; just 14% do all three activities while another 19% participate in two creator activities (see Figure 4-1).

- **Critics.** These online consumers participate in either of two ways — commenting on blogs or posting ratings and reviews on sites like Amazon.com. This level of participation isn't nearly as intense as being a Creator — Critics pick and choose where they want to offer their expertise and often use another blog post or product as the foundation for their contribution. Critics represent 19% of all adult online consumers and on average are several years older than Creators. Two-thirds of them post ratings and reviews, but only 22% comment on blogs *and* rate/review Web site content (see Figure 4-2). Four out of 10 Critics are Creators as well.[3]

- **Collectors.** When users save URLs on a social bookmarking service like del.icio.us or use RSS feeds on Bloglines, they create metadata that's shared with the entire community.[4] This act of collecting and aggregating information plays a vital role in organizing the tremendous amount of content being produced by Creators and Critics — for example, del.icio.us users can see all of the Web pages tagged MauiHotel even if they never bookmarked a page themselves. Collectors represent 15% of the adult online population and are the most male-dominated of all the Social Technographics groups. More than two-thirds tag pages, while more than half use RSS (see Figure 4-3).

Figure 2 Social Technographics Groups Consumers By Activity In The Participation Ladder



Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

42057 Source: Forrester Research, Inc.

- **Joiners.** This unique group has just one defining behavior — using a social networking site like MySpace.com or Facebook. Despite the current hysteria about social networks, Joiners represent only 19% of the adult online population and are the youngest of the Social Technographics groups. They are highly likely to engage in other Social Computing activities — 56% also read blogs, while 30% publish blogs (see Figure 5-1).

- **Spectators.** This group of blog readers, video viewers, and podcast listeners, which represents 33% of the adult online population, is important as the audience for the social content made by everyone else. As a group, Spectators are slightly more likely to be women and have the lowest household income of all the Social Technographics groups. The most common activity for Spectators is reading blogs, with only a small overlap with users who watch peer-generated video on sites like YouTube (see Figure 5-2). It's important to note that Creators can also be Spectators — someone who writes a blog about antique cars may be a listener of the *LOST* podcast — but that many Spectators fail to climb higher up the participation ladder. In all, 31% of Spectators do not engage in Creator, Critic, Collector, or Joiner activities.

- **Inactives.** Today, 52% of online adults do not participate at all in social computing activities. These Inactives have an average age of 50, are more likely to be women, and are much less likely to consider themselves leaders or tell their friends about products that interest them. While they don't participate, they are affected when the activity of others — for example, in blogs or online consumer-generated videos — gets covered in the news media.

Figure 3 Adult Social Computing Users Represent An Attractive Demographic And Psychographic

	Creators	Critics	Collectors	Joiners	Spectators	Inactives
Average age (years)	39	42	45	37	42	50
Male	51%	53%	58%	48%	56%	43%
Average household income	$61,922	$66,688	$66,475	$56,472	$67,889	$59,168
Broadband	73%	68%	69%	69%	71%	49%
Technology optimist	75%	77%	76%	71%	75%	48%
"I am a natural leader."	38%	37%	35%	32%	31%	17%
"I often tell my friends about products that interest me."	53%	53%	53%	56%	52%	33%

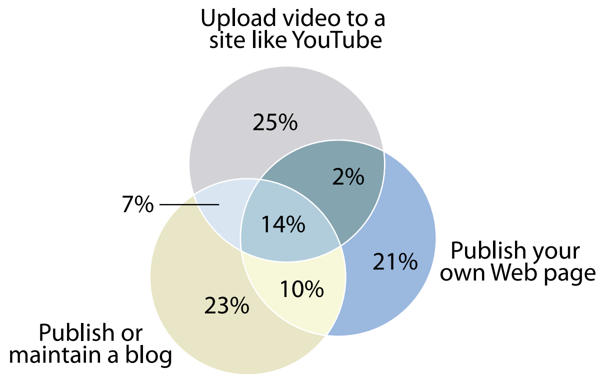
Base: US adult online consumers

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey
*Responses are from adult online consumers only and do not include non-adult users

42057 Source: Forrester Research, Inc.

Figure 4 Users In Each Participation Category Engage In Different Activities

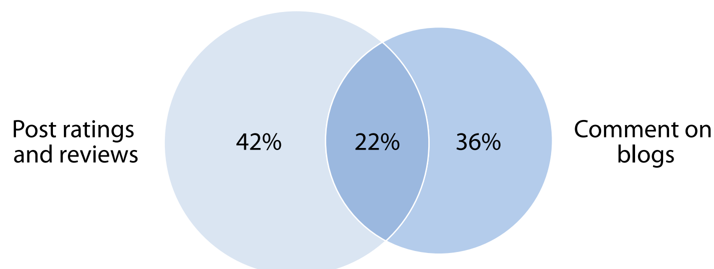
4-1 Creators engage in different activities, yet few do all of them



Base: US adult online consumers in the Creators category who do each activity at least monthly (percentages may not total 100 because of rounding; areas in graphic are not to scale)

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

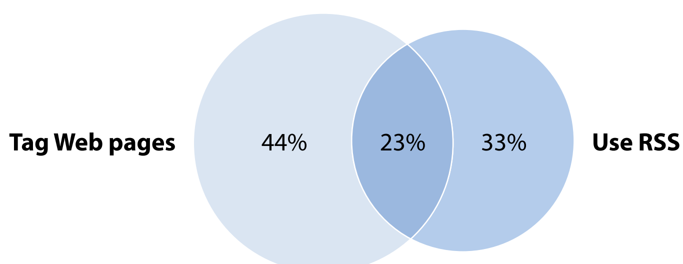
4-2 Most Critics provide ratings and reviews on sites like Amazon



Base: US adult online consumers in the Critics category who do each activity at least monthly

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

4-3 Collectors are more likely to tag Web pages on sites like del.icio.us



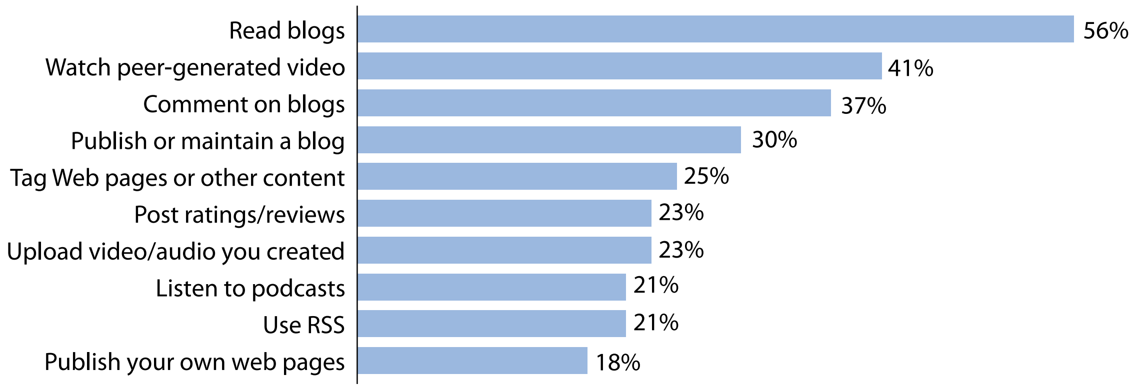
Base: US adult online consumers in the Collectors category who do each activity at least monthly

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

42057 Source: Forrester Research, Inc.

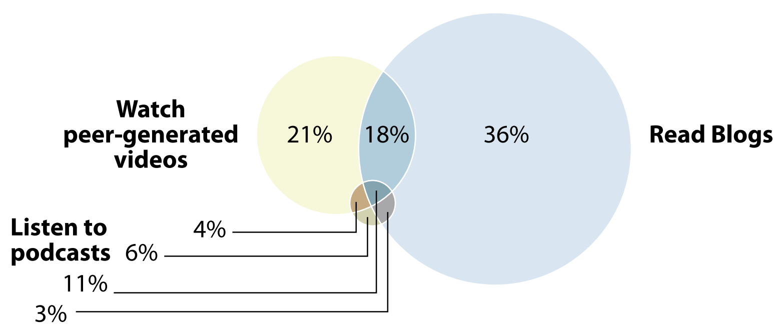
Figure 5 Joiners Participate In Many Activities While Spectators Mostly Read Blogs

5-1 Joiners do a variety of different activities



Base: US adult online consumers in the Joiners category who do each activity at least monthly

5-2 Most Spectators read blogs and watch videos



Base: US adult online consumers in the Spectators category who do each activity at least monthly (areas not to scale, percentages may not total 100 because of rounding)

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

42057

Source: Forrester Research, Inc.

UNDERSTAND YOUR SOCIAL TECHNOGRAPHICS PROFILE

Social Technographics is a tool that marketers should use before building a strategy. Ask yourself: What are the Social Technographics of my customers? We answer this question for clients by producing a Social Technographics profile, a chart with six bars reflecting the level of participation of any audience, group, or behavioral category in each of the six rungs of the Social Technographics ladder. We can analyze the Social Technographics of any age segment or of visitors to any Web site.[5]

Social Technographics Profiles Vary By Age

Just as different generations watch different shows and read different magazines, necessitating marketers to have different media plans for each group, the unique Social Technographics profile for each generation also requires varying social strategies (see Figure 6). For example:

- **Teenagers create more than any other generation.** Youth between 12 and 17 years old are avid users of Social Computing technologies, with more than one-third engaging as Creators. But this is a fairly self-centered age group — while very likely to create their own content, they are less likely than Gen Yers to be Critics and Collectors. And true to their social nature, nearly half of these teenagers are in social networks, while just one-third are Inactives. The key to reaching this group will be to appeal to its need for self-expression. For example, the social networking site Piczo has a large following of 13- to15-year-old girls because new members are presented with a completely blank page — perfect for a young teenage girl, but intimidating to her older sister or mother.

- **Joiners dominate Gen Yers.** While this age group has higher percentages in each category than every other age group (except for youth Creators), it's their sky-high participation in social networks that stands out. In fact, there are slightly more Joiners than Spectators — meaning that Gen Yers are less likely to passively read, watch, or listen to social media, even when it's created by their peers. So while marketers use profiles on MySpace.com and Facebook to reach this generation, successful marketers make sure that viral elements — not static links and videos — are a key feature. Nike Soccer's page on MySpace.com promotes Joga.com — a social networking site built around the World Cup last summer — which at its peak had more than 1 million worldwide members.[6]

- **Gen X Spectators form the foundation for future participation.** While significantly fewer members of Gen X are at the top of the participation ladder, that four out of 10 are already using social media as Spectators means that they are well positioned to take the next step. The foundation for future participation: Critics, who already encompass one-quarter of all online Gen Xers. This generation has plenty of knowledge to share, from rating recipes on Allrecipes to offering reviews of a new restaurant on Citysearch, and marketers should tap into this new habit to encourage first-time participants.

- **Boomers and Seniors need more relevant content and services to get them engaged.** Don't write off older generations — many are participating, especially as Spectators. The problem to date has been the lack of relevant content — most blogs don't address interesting issues that are important to these generations. The advent of sites like Eons — which is a social networking site that incorporates blogging and targets users age 50 and older — means that Boomers and Seniors are more likely to find something that inspires greater levels of participation. Marketers eager to tap into the soon-to-retire Boomers should invest in services and technologies that make it effortless for them to be Creators, while supporting the existing Creators (e.g., YouTube's geriatric1927) by growing the Spectator base with search engine optimization and syndication.[7]

Figure 6 Social Technographics Profiles Differ Significantly By Age

Percent of each generation in each Social Technographics category

	Youth (12 to 17)*†	Youth (18 to 21)*†	Gen Y (18 to 26)*	Gen X (27 to 40)	Young Boomers (41 to 50)	Older Boomer (51 to 61)	Seniors (62+)	Total
Creators	34%	37%	30%	19%	12%	7%	5%	13%
Critics	24%	37%	34%	25%	18%	15%	11%	19%
Collectors	11%	16%	18%	16%	15%	16%	11%	15%
Joiners	51%	70%	57%	29%	15%	8%	6%	19%
Spectators	49%	59%	54%	41%	31%	26%	19%	33%
Inactives	34%	17%	21%	42%	54%	61%	70%	52%

Base: US online consumers in each generation

*Source: Forrester's NACTAS Q4 2006 Youth Media & Marketing And Finance Online Survey
†Note: The youth categories differ in that different activities and frequency of use were used. The youth cutoff was at least once per week versus at least once per month for adults.
Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

42057 Source: Forrester Research, Inc.

Using Social Technographics For Sites And Brands

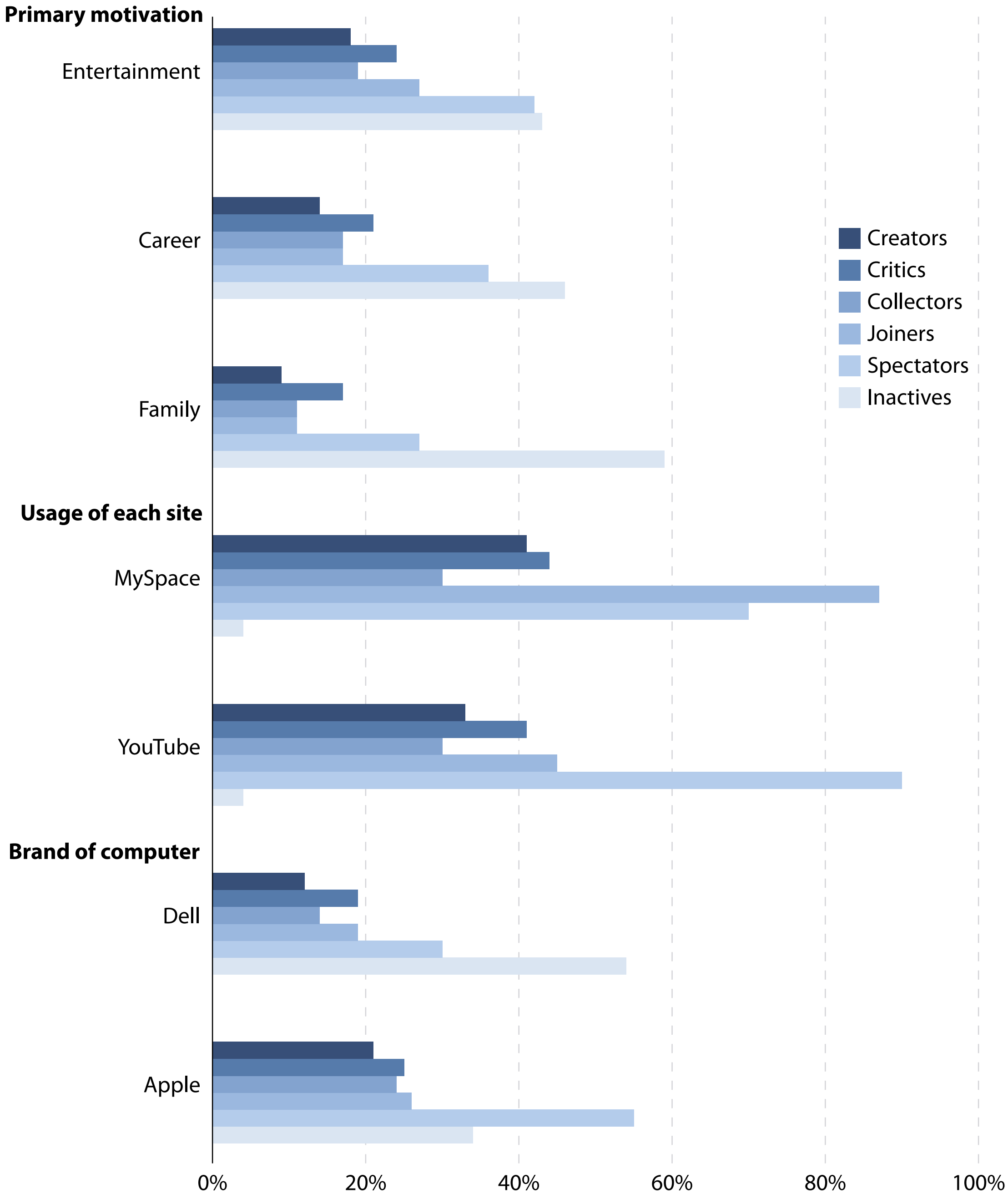
The same type of Social Technographics analysis we did for brands can apply to any subgroup of consumers. For example, the Social Technographics profile of entertainment-motivated users is more advanced than other motivations, and profiles of Web site visitors and computing brands reveal what strategies their owners should use.

- **Entertainment-motivated users participate in greater numbers.** Forrester already segments users by one of three primary motivations — entertainment, career, and family. Examining the Social Technographics profile for these groups reveals how different they are (see Figure 7).[8] Entertainment-driven users are much more likely to participate in Social Computing activities than family-motivated users. Thus, while companies like Warner Bros. Entertainment can be more aggressive about using Social Computing tools to market the Harry Potter movies, Disney's new Disney Family will need to ease its users into the Social Computing world, focusing on Spectators along with Creators and Critics.

- **Site features can also influence participation profiles.** Not all Social Computing/Web 2.0 sites are created the same — the profiles for MySpace.com and YouTube differ significantly, given the activities available on those sites.[9] But note that while 41% of MySpace.com users are Creators, they are not necessarily Creators *on* MySpace.com. But the fact that they have created content elsewhere makes them more likely to contribute content on other sites as well.

- **Brands appeal to different types of Social Computing users.** Apple and Dell computer owners have very different Social Technographics profiles as well — Apple owners are much more likely to be engaged in Social Computing, partly because Apple hardware and software is geared to media creation. But Apple inherently understands its market's need to connect — the Apple Students sponsored group on Facebook has more than 400,000 members, which makes it the largest commercial group on that social networking site.[10] Dell hasn't sat on the sidelines despite its less-involved Social Technographics profile — its Direct2Dell blog speaks to the 30% of Dell owners who read blogs regularly.

Figure 7 Social Technographics Profiles Differ By Motivation, Site Use, And Brands



Base: US adult online consumers

Source: Forrester's NACTAS Q4 2006 Devices & Access Online Survey

42057

Source: Forrester Research, Inc.

RECOMMENDATIONS

START WITH A PARTICIPATION VISION

Rather than pursue Social Computing technologies based on fashion, marketers need to think about how they want to engage with their customers and prospects — and create content, features, and functionality that create a path for participation. For example, eBags understood that its users were unlikely to write blogs or upload videos about luggage — but that they *could* expect customers to rate products if the site made it easy for them to do so. To get started, as marketers, you should:

- **Understand the Social Technographics profile of your audience.** Does your site currently attract Critics who are willing to provide reviews of your products, like Amazon.com does? Or are your users natural Creators, which Apple has in abundance? A best practice is to analyze your Social Technographics profile before starting out. Short of that, at least examining sites that your audiences frequents or looking at top-referring sites for traffic will give you some idea of which Social Computing technologies customers are using.
- **Map out how users will participate — both today and in the future.** Envision how you want to interact with your customers in the short term but also how you hope they will engage with you and with each other in a few years. You will want to have a plan of how to keep your audience engaged as it moves up the Social Technographics ladder — today's Spectators will soon be Critics, and you better be prepared with features for them to participate in that way.
- **Create multiple participation points.** Don't be stingy with opportunities — you never know how users will want to interact and engage. YouTube understood from the beginning that its success was predicated on the growth of community *around* videos, not the videos themselves. As such, they created many ways for users to participate — from saving favorite videos (a Collector activity) that other users can peruse to adding comments about each video (a Critic activity). YouTube also encourages viral spreading of content by making it easy for Creators to post videos on their own blogs or Web pages.
- **Find lightweight ways for first-time Creators to contribute.** It's pretty scary for a new Creator to push the publish button for the first time, so make it easy and fun for them. Boston.com did this by asking sports fans to recall where they were when Billy Buckner bobbled the ball during the sixth game of the World Series in 1986.[11]
- **Make it easy for Spectators to find user-generated content.** Where does your Social Computing content live on your site — is it buried in a separate section, or is that content integrated into site search? iVillage integrates threads from its message boards into search results and also enables message board searching from the main search page. And CarePages.com places stories of inspiration from users in key areas like the breast cancer support pages.

- **Prepare your organization for participation — and criticism.** Encouraging participation will be a messy, inexact process — and at times painful, as mistakes are made. Expect negative comments and accept them, just as Dell does. Dell turns a negative into a positive by routing customer service issues submitted in the comments of its blog to a special group inside customer service that expedites handling these requests.[12]

SUPPLEMENTAL MATERIAL

The underlying spreadsheets for all figures are available online. Additional data is available in online spreadsheets associated with Figure 1 and Figure 6.

The consumer data used in this report comes from two sources. The first source is Forrester's North American Consumer Technology Adoption Study Q4 2006 Devices & Access Online Survey, an online survey of 4,475 US individuals, conducted in December 2006. The second source is Forrester's North American Consumer Technology Adoption Study Q4 2006 Youth Media & Marketing And Finance Online Survey, an online survey of 4,556 US individuals conducted in October 2006. Forrester weighted the data by age, income, and broadband adoption to demographically represent the US population.

ENDNOTES

1 Technology and social changes are creating a potent mix of forces that will transform the way all businesses — not just media firms — operate, create products, and relate to customers. Forrester calls this shift Social Computing. See the February 13, 2006, Forrester Big Idea, "Social Computing."

2 Butterfinger's Follow The Finger campaign on YouTube received roughly 50 video submissions. See http://www.youtube.com/followthefinger.

3 Critics can also be Creators and vice versa. For example, someone who publishes a blog could also comment on other blogs. This applies to all of the groups — users can be in one or all of the Social Computing groups, with the exception of Inactives. By definition, Inactives participate in no other Social Computing activities.

4 Tagging is done on sites like del.icio.us and Flickr, where users can label a photo or Web page. Later, the user can retrieve that photo or Web page by doing a search for the word that was used to label, or tag, that content. A key feature on tagging sites is that user tags are by default public, in that other users can see the photos or Web pages and benefit from the tagging. Thus, users from around the world can see photos of a solar eclipse (http://flickr.com/search/?q=solar+eclipse) or Web pages about scuba diving on Maui (http://del.icio.us/search/?fr=del_icio_us&p=maui+scuba&type=all) that have been saved by other people.

5 For sites we track in our Consumer Technology Adoption Study surveys, we can produce the Social Technographics profile from this data. For other sites, we can conduct custom surveys, or site owners can poll visitors to their sites about their participation in the Social Computing activities that define our Social Technographics groups.

[6] The Nike Soccer page on MySpace.com can be found at www.myspace.com/nikesoccer.

[7] YouTube user geriatric1927 is one of the most popular video creators on the site, with more than 40,000 subscribers to his video channel as of the end of March 2007. See http://www.youtube.com/profile?user=geriatric1927.

[8] What drives consumers' day-to-day behaviors — including their technology decisions? Technographics identifies three primary motivations based on consumers' three strongest needs: career, family, and entertainment. See the December 14, 2004, Trends "Why Technographics Still Works."

[9] Note that these are activities that users of these sites do at least once per month *anywhere*, not necessarily on these specific sites. For example, 41% of MySpace.com users are Creators — but not necessarily on MySpace.com.

[10] The Apple Students group on Facebook requires registration to view and is available at: http://www.facebook.com/group.php?gid=2204894392.

[11] This is a moment seared into the brains of every Red Sox fan, when Billy Buckner allowed the ball to go through his legs and opened the door to a Mets win and the World Series title. The board is closed to new submissions, but is still viewable at http://boards.boston.com/n/pfx/forum.aspx?tsn=6&nav=messages&webtag=bc-redsox&tid=22190&redirCnt=1.

[12] Dell's blog, "Direct2Dell" can be viewed at: www.direct2dell.com. One blog post specifically lays out how the blog moderates comments and forwards customer service issues: http://direct2dell.com/one2one/archive/2006/07/14/489.aspx.

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