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# Introducing The New Social Technographics®

by Josh Bernoff

for Interactive Marketing Professionals



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## Introducing The New Social Technographics®

How Conversationalists Change The Marketing Landscape

by **Josh Bernoff**

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### EXECUTIVE SUMMARY

Social technologies have arrived big time. Facebook and Twitter are on the vanguard of much of the most active online social activity. When we created the Social Technographics® ladder of behaviors, we anticipated most categories of social behavior that continue today with one exception: the rapid conversations that take place in tweets and Facebook status updates. To reflect the new behavior, we've added a rung to the Social Technographics ladder: Conversationalists, a group that starts out with 33% of the online population (compared with 70% who consume social content and 59% who use social networks). Marketers should still analyze the behaviors of their target audiences, but now analyzing markets by segment has become more important.

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### NOTES & RESOURCES

This document is based exclusively on  
Technographics data.

#### **Related Research Documents**

"The State Of Consumers And Technology:  
Benchmark 2009, US"

September 2, 2009

"The Broad Reach Of Social Technologies"

August 25, 2009

## THE RISE OF THE CONVERSATIONALISTS

Two years ago, we defined six overlapping classifications of online social behaviors, from the Creators (those who create content) to the Spectators (those who consume it).<sup>1</sup> While adoption has spread rapidly — Spectators have grown from 48% of online consumers to 70% now — the *types* of social activities people were doing remained remarkably consistent. People then blogged and commented, contributed to discussion forums, voted on sites like Digg, joined social networks, and watched user-created videos, and they still do.

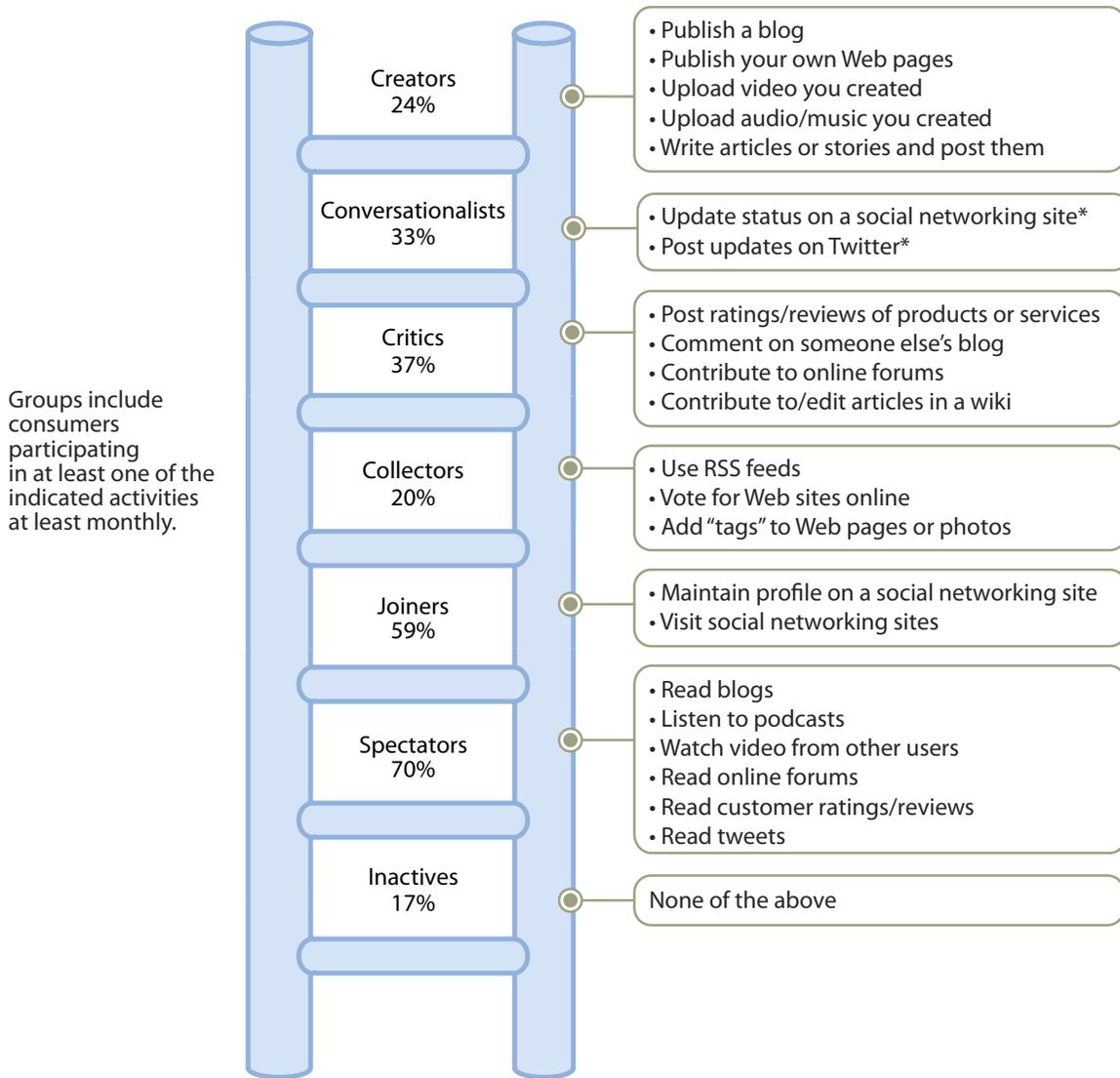
But a new behavior has captured the imagination of social participants — rapid conversations. Twitter and Facebook have generated a unique set of rapid conversational interactions characterized by replies, retweets, and hashtags. While Twitter gets much of the ink, our surveys indicate that there are actually even more people conversing this way through Facebook. To describe this behavior, we've created a new rung on the Social Technographics ladder: Conversationalists, who tweet or update their social network status at least weekly (see Figure 1).<sup>2</sup>

### Conversationalists Are An Intriguing Group, Demographically

While conversationalists are younger than the average adult consumer, their other demographics are sufficiently diverse to attract a wide range of marketers — which is why so many companies are connecting with their customers on Twitter and Facebook.

- **Conversationalists have attractive demographics.** They are 56% female, the highest concentration of women in any of the Social Technographics groups (see Figure 2). Their household incomes are slightly above average, and they're more likely than any other social classification to have college degrees.
- **Young people are still the most active, but all age groups are participating.** For two years, we've watched the typical staircase pattern that reflects how all types of social technology behaviors are correlated with youth (see Figure 3). But the skew isn't as pronounced as it used to be; as a result, marketers targeting all ages can now use social technologies effectively. For example, while the average Conversationalist is eight years younger than the average online adult, two-thirds of Conversationalists are older than 29, and one-fourth are older than 44.

**Figure 1** The Social Technographics Ladder Now Includes Conversationalists



Base: US online adults

Source: North American Technographics® Empowerment Online Survey, Q4 2009 (US)

\*Conversationalists participate in at least one of the indicated activities at least weekly.

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Source: Forrester Research, Inc.

**Figure 2** The Demographics Of Social Technographics Groups

| <b>Generation</b>                 | <b>US</b> | <b>Creators</b> | <b>Conversation-<br/>alists</b> | <b>Critics</b> | <b>Collectors</b> | <b>Joiners</b> | <b>Spectators</b> | <b>Inactives</b> |
|-----------------------------------|-----------|-----------------|---------------------------------|----------------|-------------------|----------------|-------------------|------------------|
| Gen Y<br>(18 to 29)               | 21%       | 37%             | 36%                             | 30%            | 35%               | 28%            | 24%               | 9%               |
| Gen X<br>(30 to 43)               | 31%       | 35%             | 37%                             | 33%            | 36%               | 34%            | 31%               | 25%              |
| Younger Boomers<br>(44 to 53)     | 19%       | 13%             | 14%                             | 15%            | 15%               | 16%            | 18%               | 21%              |
| Older Boomers<br>(54 to 64)       | 18%       | 10%             | 9%                              | 14%            | 10%               | 14%            | 17%               | 24%              |
| Seniors<br>(65 and older)         | 11%       | 5%              | 4%                              | 7%             | 4%                | 7%             | 9%                | 21%              |
| <b>Demographics</b>               |           |                 |                                 |                |                   |                |                   |                  |
| Average age                       | 44        | 36              | 36                              | 40             | 37                | 40             | 42                | 51               |
| Percent female                    | 52%       | 48%             | 56%                             | 48%            | 45%               | 55%            | 50%               | 51%              |
| Average annual household income   | \$79,100  | \$81,400        | \$81,200                        | \$81,300       | \$86,000          | \$80,400       | \$83,100          | \$69,400         |
| Earned a college degree or higher | 43%       | 42%             | 41%                             | 44%            | 48%               | 43%            | 46%               | 35%              |

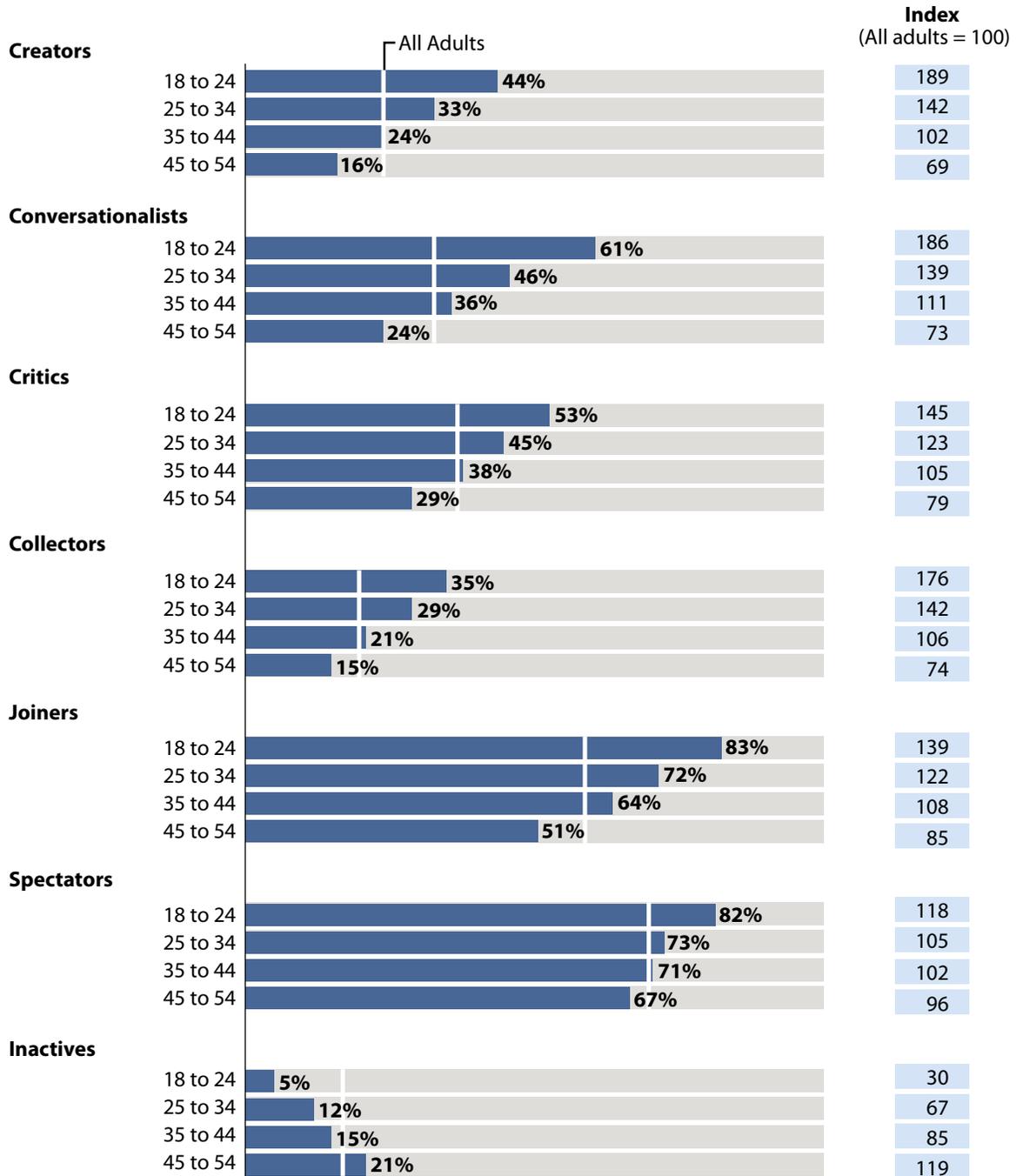
Base: US online adults

Source: North American Technographics® Empowerment Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

**Figure 3 Social Participation Still Varies By Age**



Base: US online adults

Source: North American Technographics® Empowerment Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

## USING THE NEW SOCIAL TECHNOGRAPHICS TO ANALYZE A MARKET STRATEGY

We've now used Social Technographics with more than 100 clients. As the first step in the POST process (people, objectives, strategy, technology), Social Technographics helps identify the best ways to reach out to customers based on their behaviors.<sup>3</sup>

Here's how we and our marketing clients use the ladder. First, examine the online social behaviors of your target market (for example, youth, mothers with young children, or people who shop at The Home Depot). The behaviors your customers engage in tell you what sorts of applications are possible — for example, whether marketing through social networks will reach Joiner customers or whether they are likely to participate in the discussion forums that Critics patronize.

But while the ladder tells you what's possible with your customer, it doesn't tell you if they're open to connecting with your company. To be effective, a marketing application must be a valuable experience for customers *and* accomplish a marketing objective like spreading awareness or generating word of mouth. The objectives, strategy, and technology stages of POST are where you move from what customers are doing now to creating an application that is valuable to your marketing long term.

### Analyzing Mobile Data Customers With Social Technographics

To see how we use Social Technographics, let's look at the example of a marketer launching a new mobile phone, working for either a device or a mobile phone service provider (see Figure 4). You should start with a Social Technographics Profile of mobile data users to determine which kind of activities your customers are inclined to participate in. In this case:

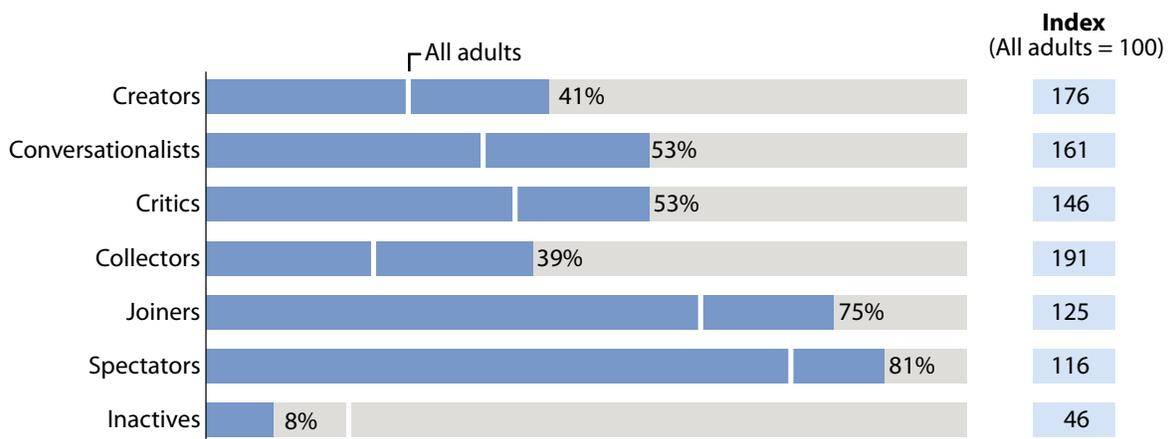
- **The profile shows a generally high level of activity.** All elements of the profile of mobile users are well above average, as indicated by index numbers greater than 100. With 81% Spectators, this group will potentially be consuming whatever social activity a marketer can stimulate. Numbers like this mean a well-designed social application for marketing can succeed. (Put differently, if the application fails, it won't be because the audience wasn't ready.)
- **Conversationalists index well above average.** With conversationalists making up 53% of this group, it's clear that generating and spreading conversations about the device could be effective. If your objective is to spread awareness, it would certainly be worthwhile to create a Twitter identity and reach out to others speaking about phones (you can find them through searches) or point them to a site where they can get rewards, encouragement, connections with other customers, or just interesting content worth talking about.
- **Joiners are very high at 75%.** With three out of four mobile data customers participating in social networks, any marketer targeting them must be there as well. Fan pages, Facebook applications, and responding quickly to wall posts are all good ideas. Combined with the

high number of Conversationalists, this points to a strategy that encourages links from within Facebook status updates, not just in Twitter.

- **The Critics, Creators, and Collectors indicate openness to other interactions.** In absolute terms, the number of Creators, Critics, and Collectors is below those of other classifications, but in relative terms, all three are well above average. These numbers indicate that a marketing campaign could include elements like user-contributed photos of customers with the phone (a Creator activity), tagging the phone in photos (a Collector activity), or encouraging comments on company or sponsored blogs (a Critic activity).

Having made these observations, the marketer needs to design a marketing program that targets a clear objective, connects with a long-term strategy, and uses appropriately chosen technologies (the O, S, and T in the POST process). The Social Technographics Profile of your customers reveals what's possible with this audience.

**Figure 4** The Social Technographics Profile Of Mobile Internet Users



Base: US online adults who use the mobile Internet at least weekly

Source: North American Technographics® Empowerment Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc

## RECOMMENDATIONS

## SOCIAL SATURATION SUGGESTS A SEGMENTED STRATEGY

As social technologies approach universal participation, marketers need to change their attitudes. The question “Should I start?” is no longer relevant (you should). The new question is, “What are my customers open to, and what are my competitors doing?” This is the landscape you’ll be navigating, and you need more sophisticated data to attack it.

- **Use different social strategies for different segments.** A client recently asked us to look at the Social Technographics Profile of Walmart customers. Not surprisingly, they look just like average Americans. A company with this broad of a customer base needs different strategies for students, moms, and seniors, each of whom will expect a different level of participation in different social venues.
- **In crowded social environments, take your cue from customers.** Want to stand out from competitors’ social efforts? Follow your customers to new types of interactions. What are your customers doing in for fun social environments like Twitter and Facebook? Use these behaviors for inspiration, and move quickly. For example, if you can create something half as viral as the “What color bra are you wearing?” meme that recently swept through Facebook status pages, you’ll be doing fine.
- **Two types of listening will help you succeed.** First, you can’t engage with customers in these environments until you know how they use them to talk about your products already. Use a listening platform to monitor online conversation.<sup>4</sup> And second, if you want to test out interactions before going public with them, start up a private community with a company like Communispace and try things out there, where the rest of the world won’t watch.<sup>5</sup> Communispace has even done experiments with Twitter and mobile devices — by protecting participant’s updates, you can protect the experiment from prying eyes. If your social app catches on in an environment like this, it’s time to release it into the wild; if not, it’s much better to fail in private.

## SUPPLEMENTAL MATERIAL

## Methodology

Forrester conducted the North American Technographics® Empowerment Online Survey, Q4 2009 (US) fielded in November 2009 of 10,112 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N = 10,112), there is 95% confidence that the results have a statistical precision of plus or minus 1% of what they would be if the entire population of US online individuals ages 18 and older had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population. The survey sample size, when weighted, was 10,045. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in

online panels.) Please note that this was an online survey. Respondents who participate in online surveys have in general more experience with the Internet and feel more comfortable transacting online. The data is weighted to be representative for the total online population on the weighting targets mentioned, but this sample bias may produce results that differ from Forrester's offline benchmark survey. The sample was drawn from members of MarketTools' online panel, and respondents were motivated by receiving points that could be redeemed for a reward. The sample provided by MarketTools is not a random sample. While individuals have been randomly sampled from MarketTools' panel for this particular survey, they have previously chosen to take part in the MarketTools online panel.

## ENDNOTES

- <sup>1</sup> We introduced Social Technographics® in 2007 as a method for analyzing consumers' participation in social technologies. We also featured it in the book *Groundswell* (Harvard Business Press, 2008). Since then we've shown Social Technographics Profiles in reports about many different industries. See the April 19, 2007, "[Social Technographics](#)" report.
- <sup>2</sup> While adding Conversationalists, we made two other minor changes. Spectators now include people who read Twitter updates at least monthly, and Inactives now *exclude* people who tweet weekly or read Twitter updates monthly. Because Twitter users are extremely likely to also be using other social activities as well, these changes make very little difference in the size of the Spectator and Inactive groups. Because these differences are so small, trending the sizes of these groups over time is still valid.
- <sup>3</sup> The POST method includes four steps: First, examine the Social Technographics Profile of your customers. Second, choose your objective: listening to, talking with, energizing, supporting, or embracing your customers and their ideas. Third, build a strategy around changing your relationship with your customers. Finally, pick the appropriate technologies to implement. See the October 9, 2007, "[Objectives: The Key To Creating A Social Strategy](#)" report.
- <sup>4</sup> Consumers continue to use social technologies to wrestle control of brands away from organizations. Marketers operating in this hyper-inclusive environment must go beyond simply tracking brand mentions and impressions and get at the root of the discussion. See the January 22, 2009, "[The Listening Platform Landscape](#)" report.
- <sup>5</sup> To succeed with a market research online community, measure the community value, garner executive support, and develop a partnership with the vendor. See the November 24, 2009, "[Best Practices For Community Research Success](#)" report.

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