



# ATLANTIC CONVERSATIONS

## IV

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MARKET REPORT

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# //2011

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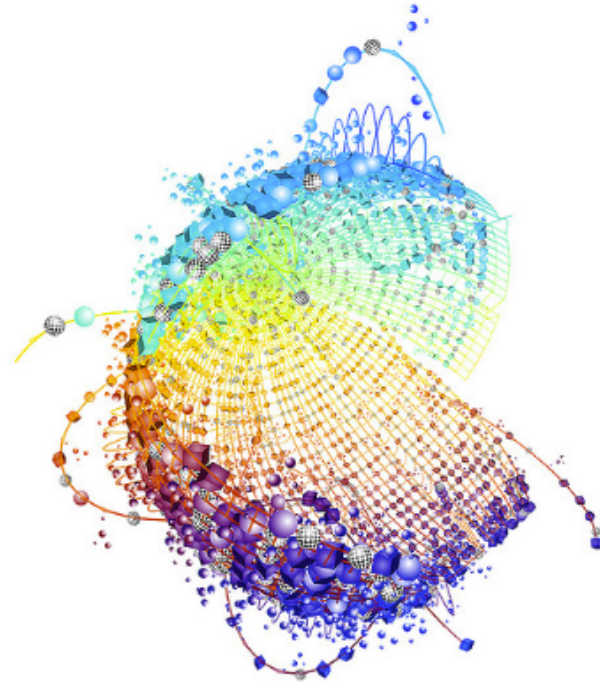
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*section 1.0 //*

*OVERVIEW OF REPORT*



## 1.1 Executive Summary

### Overview

In early 2008 we began monitoring social media use in Atlantic Canada using our proprietary mediasphere360 software. We wanted to understand how social media was being used, by whom and what was happening.

In January of 2009, we released the first public report containing highlighted information. This report provides some of the data and analysis on social media use in 2011. A more detailed report with additional insights is available for \$995.00 plus taxes.

### Sharing Our Report

Social Media has become so popular because of the tools, technologies and services that make up what is known as “Social Media” or the “Social Web.” Social Media is all about sharing and community.

So we decided to share most of what we’ve come to learn about how Atlantic Canadians are using the Social Web and why. So that businesses, governments and academics will have a common ground for developing strategies programs and opportunities for engagement with key audiences.

### About MediaBadger

Formed in 2008 the firm is a growing Intelligence and Analytics software and research firm. MediaBadger provides insights that help governments communicate & engage with the public and gain deeper insights into public policy. Tourism operators and agencies use our research to plan better campaigns and exporters reduce risks to people and assets.

Today, the company provides intelligence and analytics reports to clients around the world. We bring together our own analytical software with experienced consultants and analysts.

Some of our clients include:



## ***1.2 Approach & Methodology***

### **Approach**

Our approach to this research was to set a defined period of time in which we would analyse a set of parameters using our own social and traditional media monitoring tool, mediasphere360, to monitor Social Media channels. In addition we incorporated publicly available statistical data from recognized resources (credit provided where quoted.)

Additionally, we have continued to monitor traditional media sources with an online presence. Our objective was to understand who is using these tools, how and why.

### **Methodology**

Primary monitoring was completed using our proprietary mediasphere360 monitoring tool. This Web-based software uses a complex system of proprietary search algorithms with an integrated layer of Artificial Intelligence to help analyze and sort the vast amounts of information flowing into our servers. We defined a set of parameters to help us build a comprehensive listed of blogs, microblogs, photo and video sharing accounts and publicly available Social Network information. Information was then vetted by an analyst and a customized RSS reader used to provide inputs. Selected blogs, microblogs, photo and video accounts could then be monitored for usage rates and content volume. In addition, comment fields were analyzed on major industrial media sites (i.e. newspapers) in selected cities around the region.

We also applied the use of several other monitoring services as additional validation of the results and information. Publicly

available statistics on Internet usage from reputable sources such as Statistics Canada and Ipsos-Reid were used as the benchmark point of online demographics within the region. A specific challenge arose with monitoring certain newspaper sources in the region who delete public comments and the originating article after several days, thus eliminating a valuable resource tool for Social Anthropologists, sociologists, behaviorists, public relations practitioners and market researchers in both academic and commercial settings.

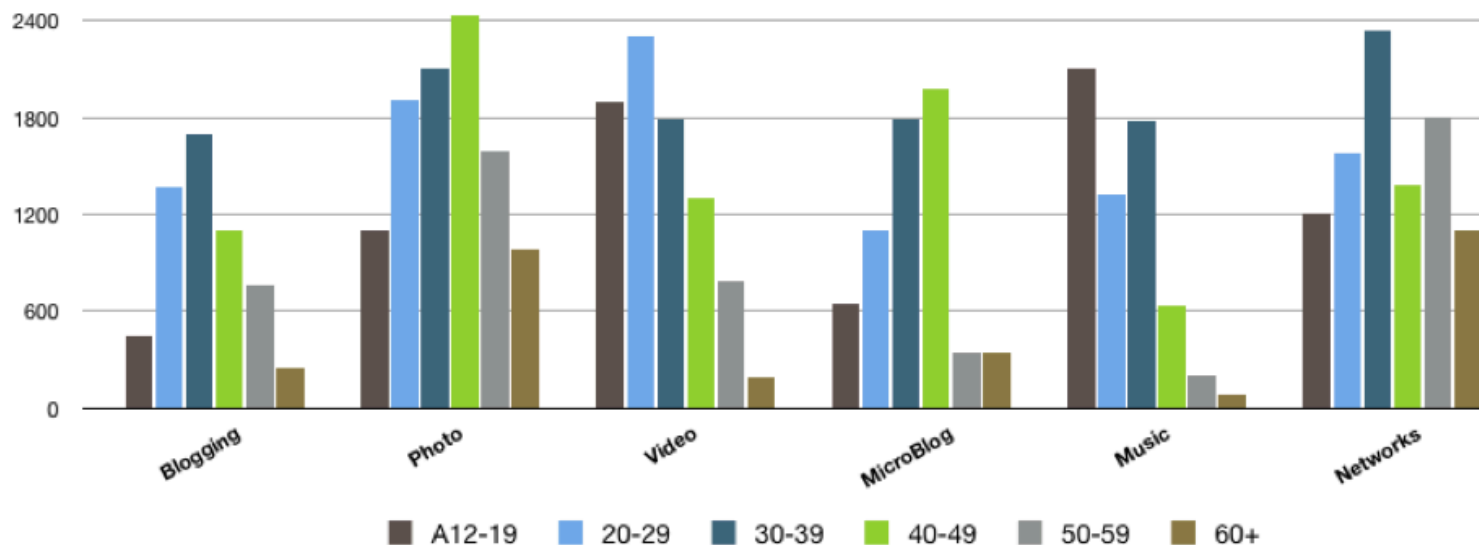
The resulting data was then analyzed over a period of weeks and compiled into this Executive Summary Report.

*section 2.0 //*

*Key Findings & Analysis*



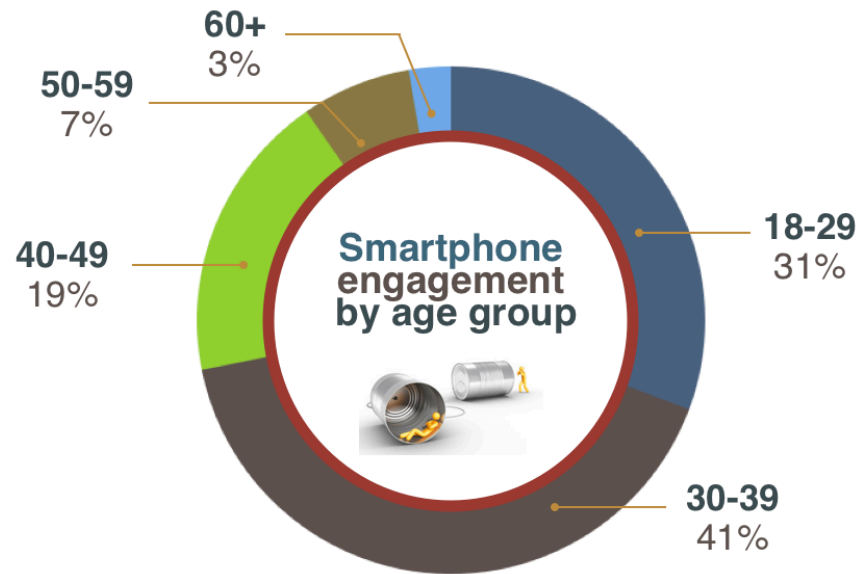
## 2.1 Social Media by Age Group



When it comes to youth, they love video; creating it, sharing it, video commenting and tagging. While YouTube remains the top video channel, we are seeing significant increases in the use of Vimeo. Those 30 and above seem to engage more with Vimeo, a similar situation as Flickr is more popular with adults for photo sharing. But the hottest social media apps for youth 12-19 is clearly music, from music videos on YouTube to services like Cloud.fm. There is some engagement in Apple's "Ping" service, but adults are not using Ping.

For social networks, it's the place of the young professional. Women tend to be more active users than men. If you're looking to reach young moms, then Facebook is the place for families. Use of microblogs like Twitter is surprisingly high in the 40-49 bracket. Youth tend to gravitate toward more "closed" networks where they can better control the conversation and mitigate exposure.

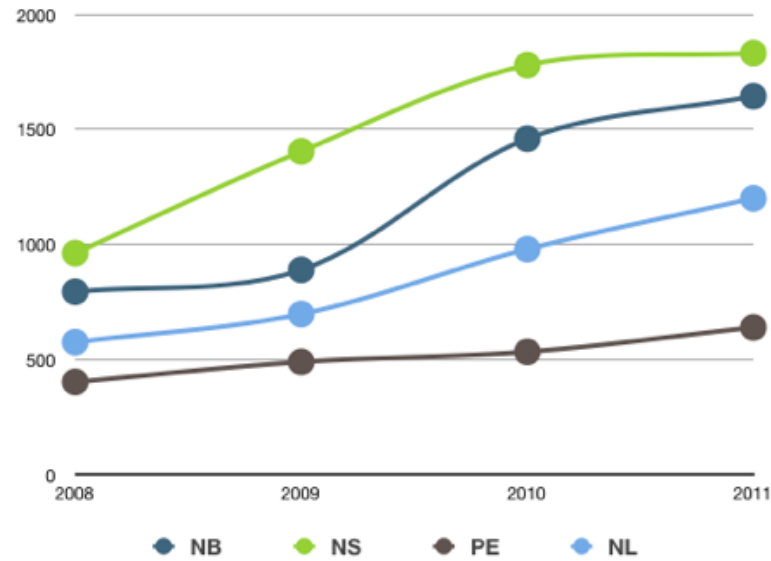
## 2.2 Smartphone Engagement in Social Media



What surprised us most is that the 30-39 age bracket used their smartphones to engage in social media activities. We do not include texting or BBM messaging for this data. The most popular engagement is with Twitter followed by Facebook or another social network where there is a mobile app available, such as LinkedIn.

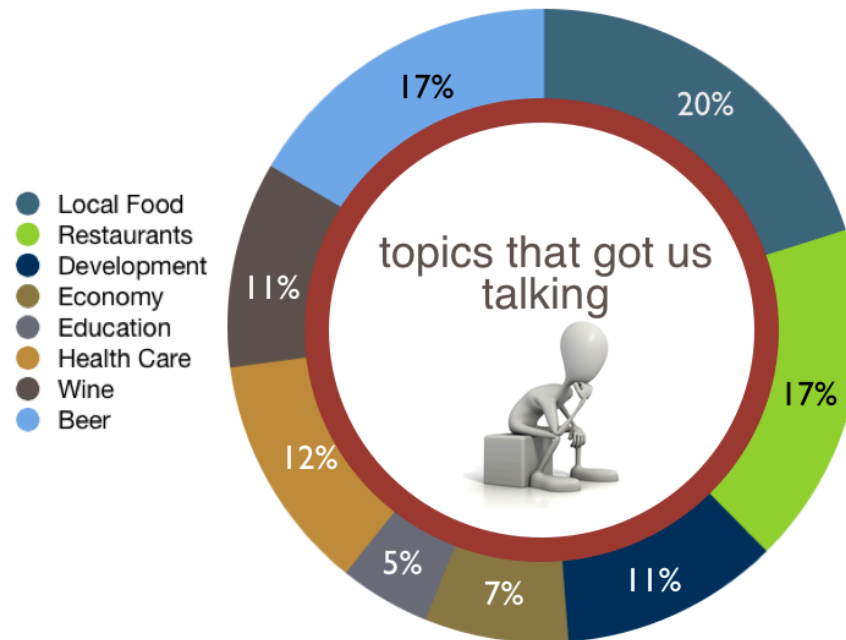
The suspected reason for lesser engagement in the 18-29 bracket may be that they tend to use texting and BBM services more than apps for social networking. We anticipate growth in use by the 40-49 bracket into 2013. We also noted that men were 4 times less likely to use a social networking app (Twitter is the preferred app for males) while women were more likely to use social networking services on a regular basis.

### 2.3 Overall Social Media Use by Province



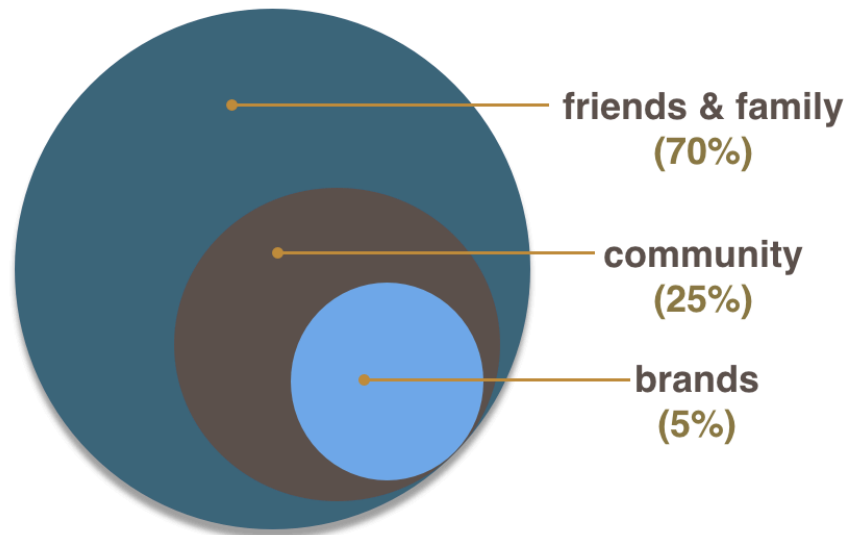
Nova Scotians have plateaued in regard to Facebook usage, but channels like LinkedIn, blogs and Twitter see continued steady growth. NB saw the most significant growth in overall social media use, but in real terms on a per-capita basis Newfoundland Labrador saw the sharpest growth. PEI continues to lag in total citizen engagement. We are not sure why. Most PEI activity involves engaging with friends and family who reside off-island. The data is averaged and based on a per-capita comparison.

## 2.4 Local Conversations



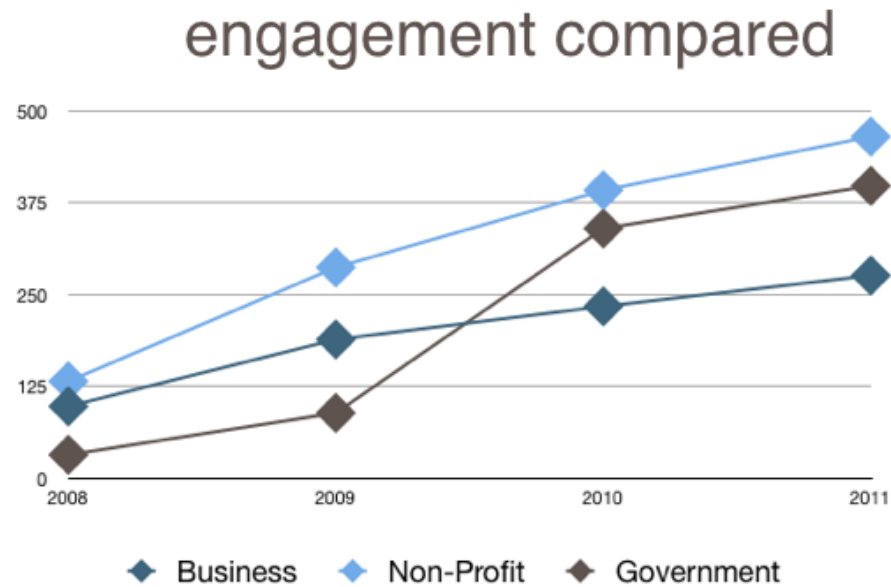
When it comes to the things we talk about locally, food leads the charge, followed by restaurants. We are seeing significant increases in the volume of discussion around “buying local” with regard to food and other products. Beer is a hot topic with discussions around microbreweries. Wine has become increasingly popular as a topic of discussion by consumers and we expect this will grow. When it comes to health care, this is where we see citizens discussing access, service quality and personal health improvement. The economy did not feature as prominently as in 2008 and 2009.

## 2.5 What Interested Us Most in 2011...and before?



By far we prefer to engage with friends and family and the related issues and sagas of our closer social networks. Following friends and family is discussion of community. Discussions around community tend to focus on issues locally first (politics, infrastructure, development) then reach out to brands. Consumers are talking about local brands such as retailers, restaurants and services, but not as much as they do about issues in society and family.

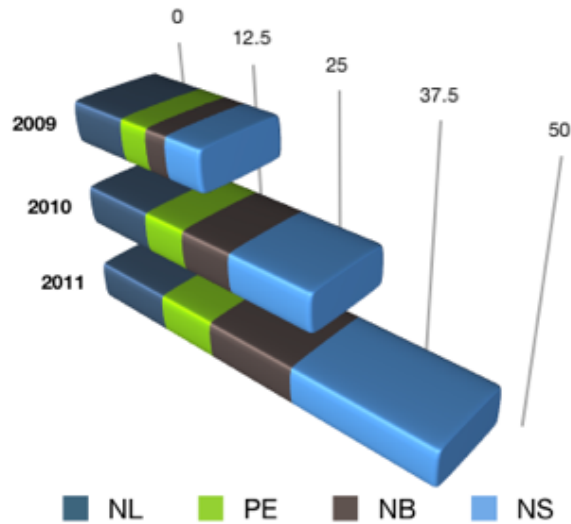
## 2.6 Engagement - Business, Non-Profits & Government



We wanted to gain insight into how business, government and non-profits are engaged overall in social media. Non-profits lead the way by increasingly active use of social media tools. Business lags even further behind government even. Businesses will tend to run a campaign in social media, but limit ongoing engagement. This is dangerous for businesses both small and large as consumers are discussing and commenting on regional and local brands. Restaurants, services businesses and retailers would benefit from deeper engagement. The challenge for them is having the resources to engage in these channels.

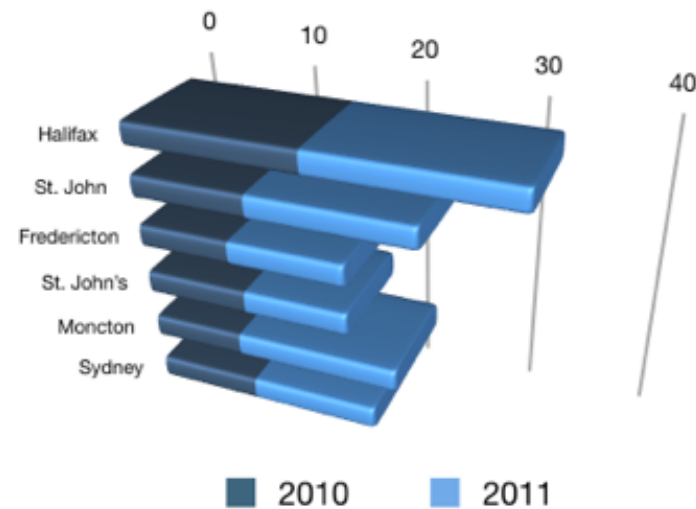
## 2.7 Engagement Continued

provincial governments



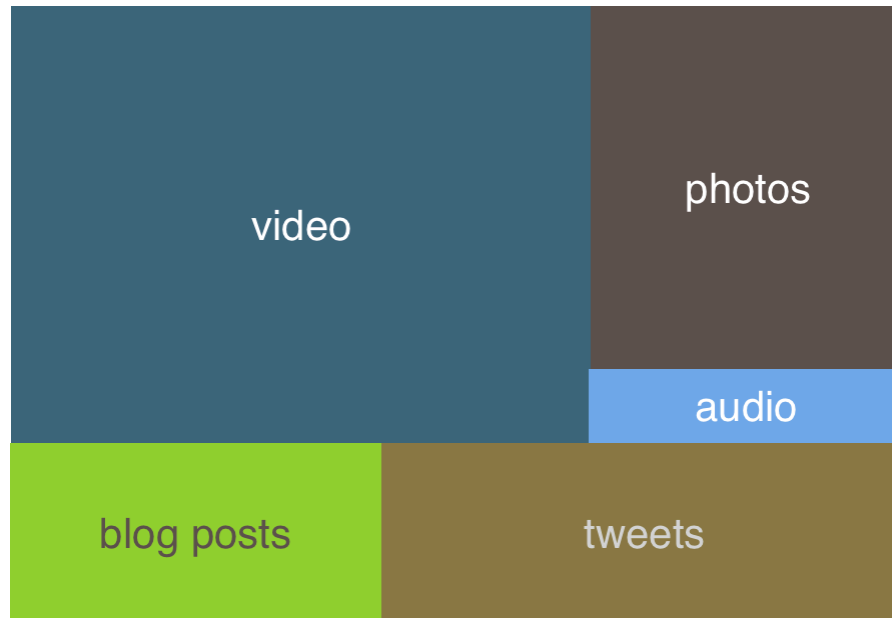
Nova Scotia government leads initiatives to use social media, while NB is in second place. They're all active on tourism related marketing, but less so with engagement on public policy. We suspect this will change in 2012 as all provinces are exploring how to best engage. Issues of respecting privacy and managing a complex process impact governments just like enterprise business and public companies.

municipal governments



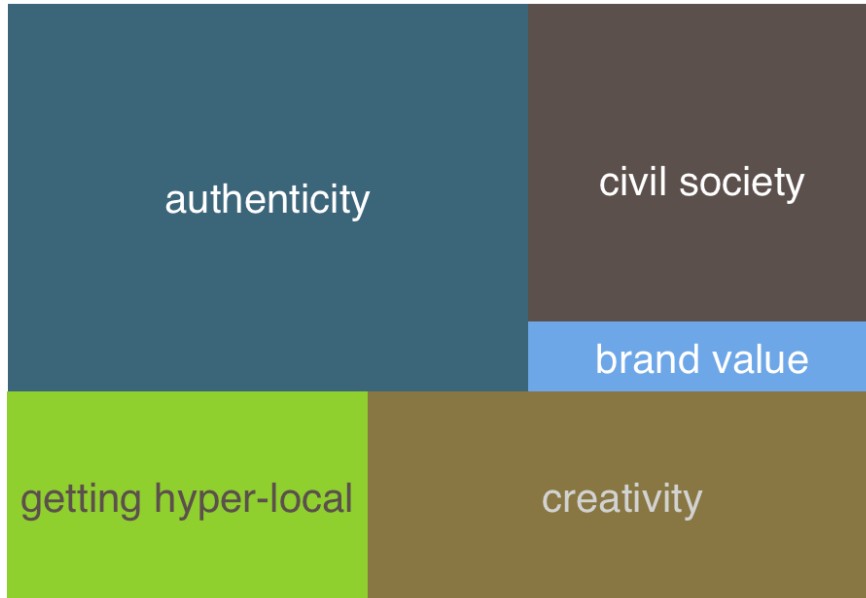
Halifax and St. John, NB are the most active in terms of social media, but it's more the councillors that are engaging rather than the government themselves. Municipal governments face the same challenges as provincial governments in terms of privacy of information. Municipalities will need to take a deeper look at how citizens are using social media.

## 2.8 What content do we share?



Video continues to lead and grow in terms of the content we share and engage with the most. For sharing, Twitter is popular as a news, local information and quick discussions in Atlantic Canada. The average age of a Twitter user being in their late 30's means marketers should not look to engage youth in Twitter. Photo's are increasing as a popular form of content sharing. Atlantic Canadians have great "pride of place" and will often share their photo's with others around the region.

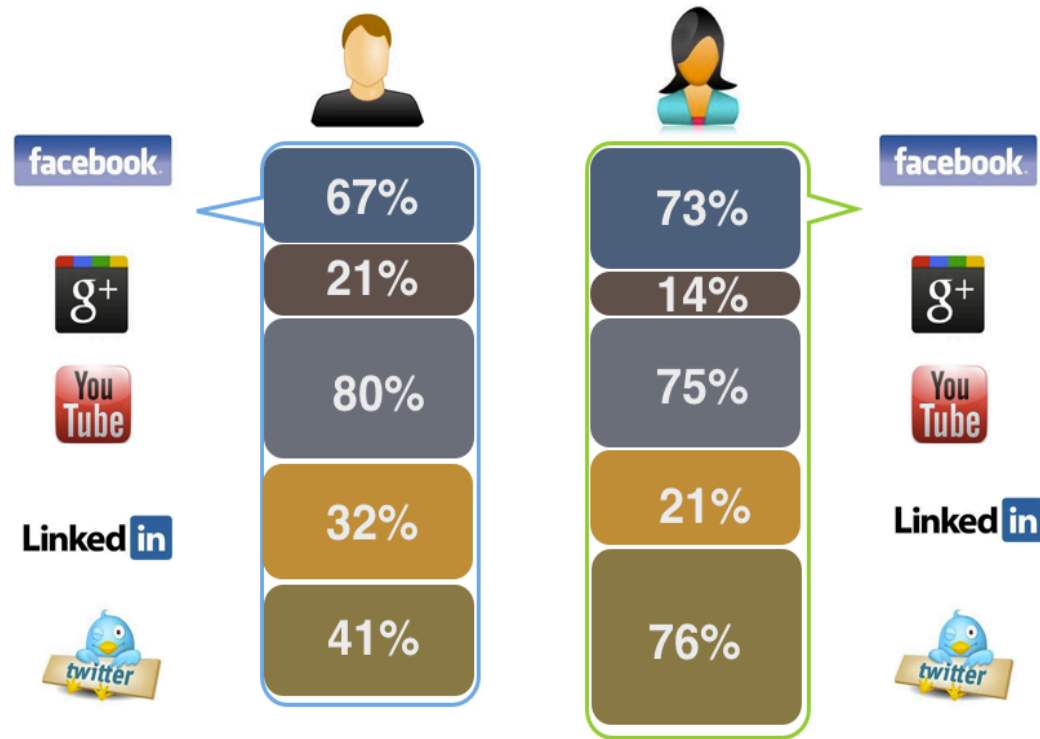
## 2.9 What are we looking for into 2012-13?



This value map was drawn from discussions we analysed to gain insight into what consumers and citizens in Atlantic Canada will be looking for in terms of engagement through social media. For government and business, they are clear indicators that people are wanting “authenticity” in their interactions. Seemingly contrived or “template” answers are likely to end up spurring an increased negative response from people.

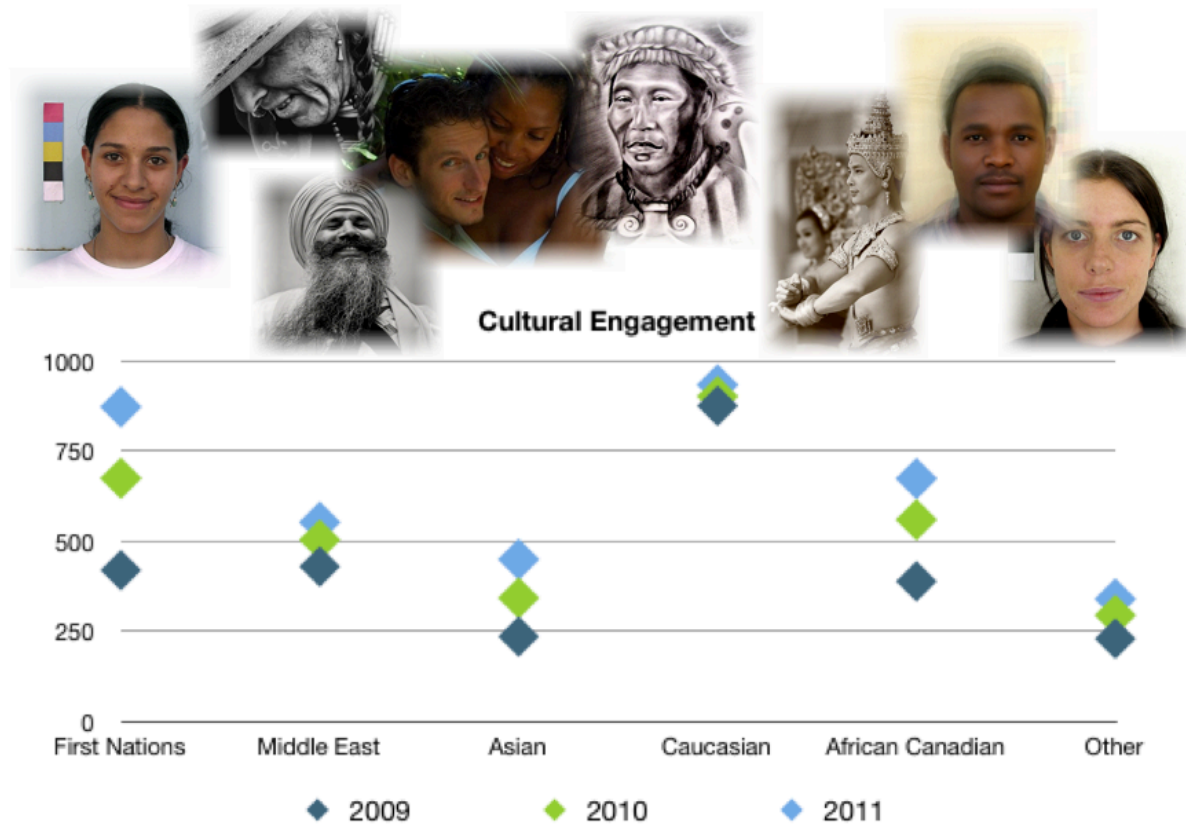
By “creativity” we anticipate consumers/citizens looking for more creative content in videos and images as well as text. To date we’ve seen very little highly creative content by agencies and their clients who have a great opportunity within these channels. People are increasingly concerned with hyper-local content and services and this will feature prominently in 2012 conversations - presenting great opportunities to local businesses.

## 2.10 % of people active on social media platforms



By “active” we mean participating, sharing or uploading content more than 3 times per week to any of these channels. Our sample size was 2,500 within Atlantic Canada.

## 2.11 We are increasingly multicultural



We saw First Nations as a cultural group growing the most use of social media in 2011. As the immigrant population slowly increases in Atlantic Canada, we see these much-needed people engaging with friends and families regionally and abroad. This represents new marketing opportunities for businesses and engagement by government to assist with integration into their new home.

## 2.13 Emerging Platforms - 2012

**Pinterest**

The biggest new service to watch in 2012, likely to be more female than male. This service will attract a lot of attention as an aggregator of content. It will pull users away from Google+ and Facebook.

**empire  
avenue**

While this service will become more popular, it will not dominate usage and likely see slower uptake. It will be dominated by males.



The underdog of social networks, it is mostly male and those more technically savvy, but we expect to see significant growth as Google integrates it more with their other services.

**tumblr**

This is the channel for the 25 and under market. It is their blogging platform of choice and is one businesses need to keep an eye on for engagement and reputation monitoring.

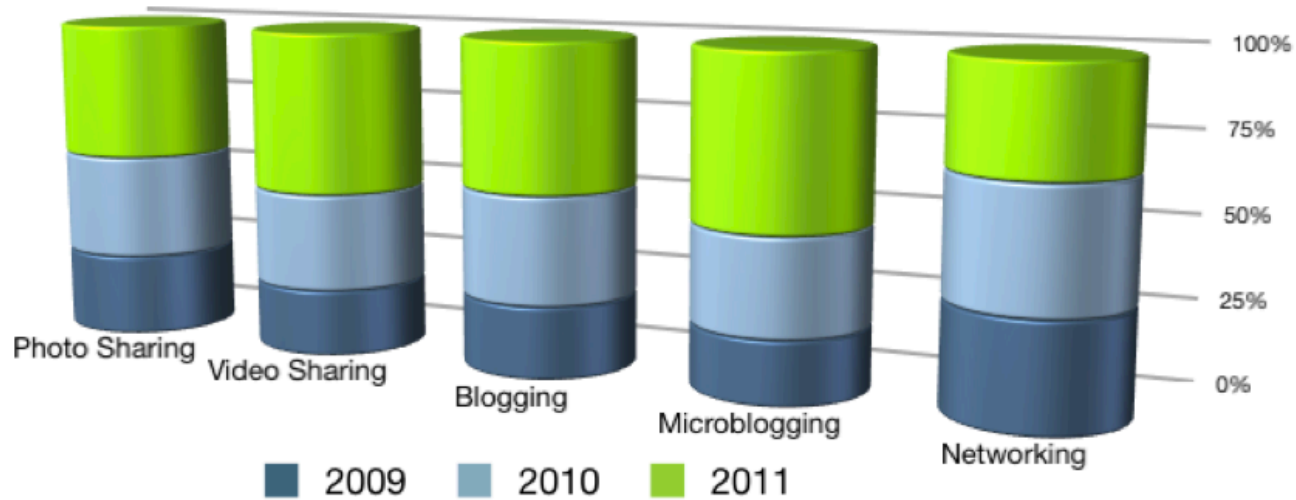
**posterous**

This is the channel for the 25 and above market. It is their blogging platform of choice and is one businesses need to keep an eye on for engagement and reputation monitoring.



It may or may not become a primary vehicle, but we have our eyes on this unique approach to story telling when it comes out of beta.

## 2.14 Top Online Activities in 2012



Microblogging and video channels saw the greatest increase in consumer use in 2011. While blogging has grown, the overall size of a blog post has shrunk from an average of 900 words in 2009 to 200 words in 2011. While Facebook is the primary social network, we are seeing increased use of niche social networks, such as those for golfers, knitters or sailors.

*section 3.0 //*

*APPENDICES*

*A - Technology*

*B - Glossary (social media terminology)*



## Appendix A - Technology

To find the relevant data to analyse, MediaBadger uses a proprietary search engine and an Artificial Intelligence Engine for analysis of text.

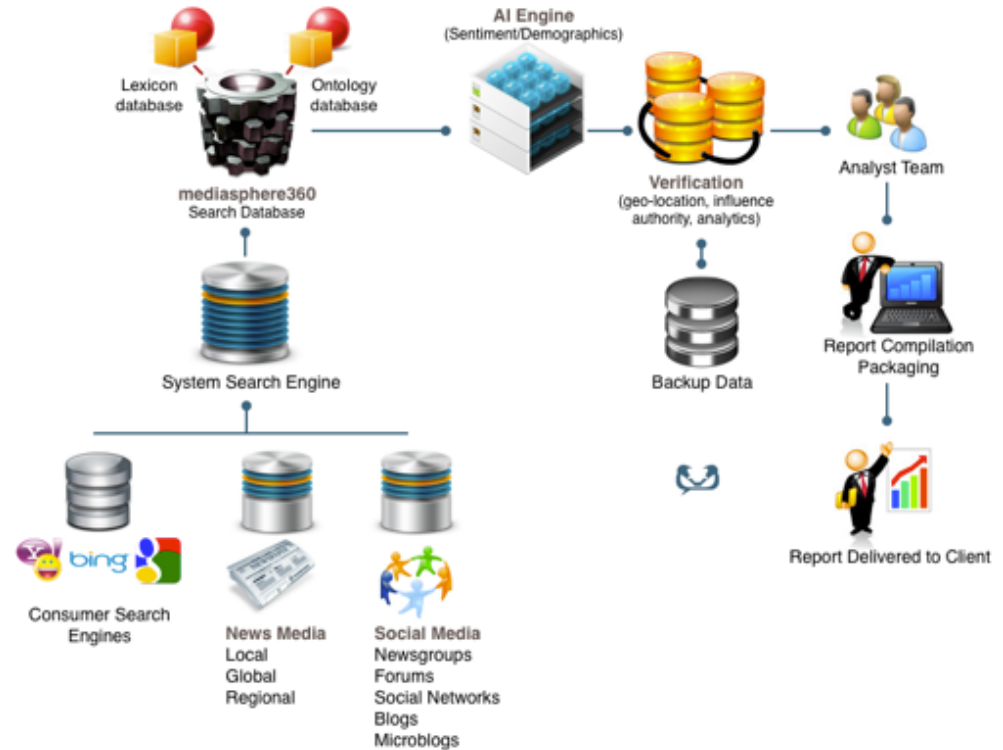
### Search Component

The search engine collects as a metacrawler from Tier 1 consumer search engines Google, Yahoo and Bing and searches where these engines don't to increase the collection capability and provide a larger sample size for text analysis.

### Artificial Intelligence Engine

The AI Engine analyses text for sentiment, gender, education levels, sentiment and other indicators that we may program based on the project at hand. Essentially, these are "algorithms" that have been and are developed by the development team.

We include this information to aid in the understanding of how we "collect" then "process" and "package" the information we find.



## Appendix B - Glossary of Social Media Terms

**Social Media:** “Social” means human behaviour in terms of communicating and organizing while “Media” means the channels used to communicate and organize.

**UI:** User Interface. These are the buttons and the design of a website or software tools.

**SEO:** Search Engine Optimization. A set of best practices use to help a website be “found” by people using search engines.

**SMO:** Social Media Optimization. A way to ensure your “content” is found in targeted Social Media channels.

**Microblog:** A service like Twitter but you have only 140 characters for a message. You can build networks of “followers”.

**Blog:** Contraction of Weblog, meaning an online type of “journal”. There are over 300 blog platforms and 500 Million blogs worldwide, both personal and professional.

**Video Sharing:** Services like YouTube, users can upload their own video and rate videos as well as comment.

**Newsgroup:** Early Social Media tool that enables people to share “news” and discuss issues.

**Forum:** Similar to newsgroup, but usually moderated and sponsored by a company.

**Social Network:** Services like Facebook that allow people to connect based on social networking theory (the sociological concept.) There are over 200 different types of “Facebook” services, often reflecting a culture or ethnic group. Includes LinkedIn a professional networking service for business.

**SMS/txt:** A service on mobile phones to send “text” only messages to other mobile phone users.

**Augmented Reality:** A service that blends software with mobile devices to enable sharing of information in new ways.

**Chatroulette:** a video conferencing service where people randomly connect to other people.

**IM or Instant Messaging:** Software that enables people to communicate 1-1 or as a group in a “chat” style. This includes MSN Messenger, Gmail Chat and iChat.

**Email:** Oldest Social Media tool that allows messages to be exchanged between computers, including files.

**Chat Room:** A service similar to IM, but in a dedicated website, topic specific and usually moderated.

**Deep Web:** Services that enable people to share ideas and files, often specific websites that include newsgroups and forums. These are not searched by search engines and require special tools to search.

**Meme:** a “trend” that emerges from a TV show or something someone says online that later represents a “concept”. Example is “bexting” where teens bet on sports using SMS/txt messaging on their mobile phones. Or Clint Eastwood’s famous line “go ahead punk, make my day” carries an inference of being cool and taking no guff from someone.

**MMOG:** Massively Multi-Player Online Game, such as SecondLife or World of Warcraft where people assume identities and act out a life in an online game that simulates real-life.

**Avatar:** An “image” that represents what a person would like to look like in a MMOG.

**Crowdsourcing:** Harnessing the skills of professionals or citizens outside the business or organization.

**RSS:** Really Simple Syndication, ability to subscribe to a blog and have the content appear in your inbox or a special reader.

**Astroturfing/Sockpuppeting:** Pretending to be someone you aren’t and/or seeding content as an impostor - usually politically motivated.

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