

THE TWITTER CONSUMER

#DEEPPDIVE2015

NETHERLANDS



@NIELSEN

TWITTER IS A DAILY ACTIVITY

52% ENGAGE **EVERY DAY**

1 IN 3 ENGAGE **SEVERAL TIMES A DAY**

THE FOLLOWING SHOWS **HOW, WHAT AND WHY**
THEY DO...



nielsen
.....

Base | All
Question | Q5: On average, how frequently do you use the following social networks?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands



METHODOLOGY

Twitter wants to understand and provide key advertisers with a wide range of insights into Twitter users in Netherlands

ABOUT THE STUDY

Nielsen conducted an online survey, which was completed by **1,544** people who have used Twitter on any device in the past 30 days in Netherlands

The survey in Aug-Sep 2015 is across a demographic profile reflective of Twitter users

Year-on-year comparisons may be made where applicable with a similar survey undertaken by Nielsen in November 2013

Indexes are used throughout to illustrate results and comparisons. For example, an index score of 110 implies that Group A is 10% more likely to do the given activity than Group B

SUMMARY



TWITTER IS A DAILY ACTIVITY

52% of users engage every day, with 1 in 3 interacting several times a day



MOBILE IS AT THE FOUNDATION OF TWITTER

63% use a mobile device as their main way of accessing Twitter



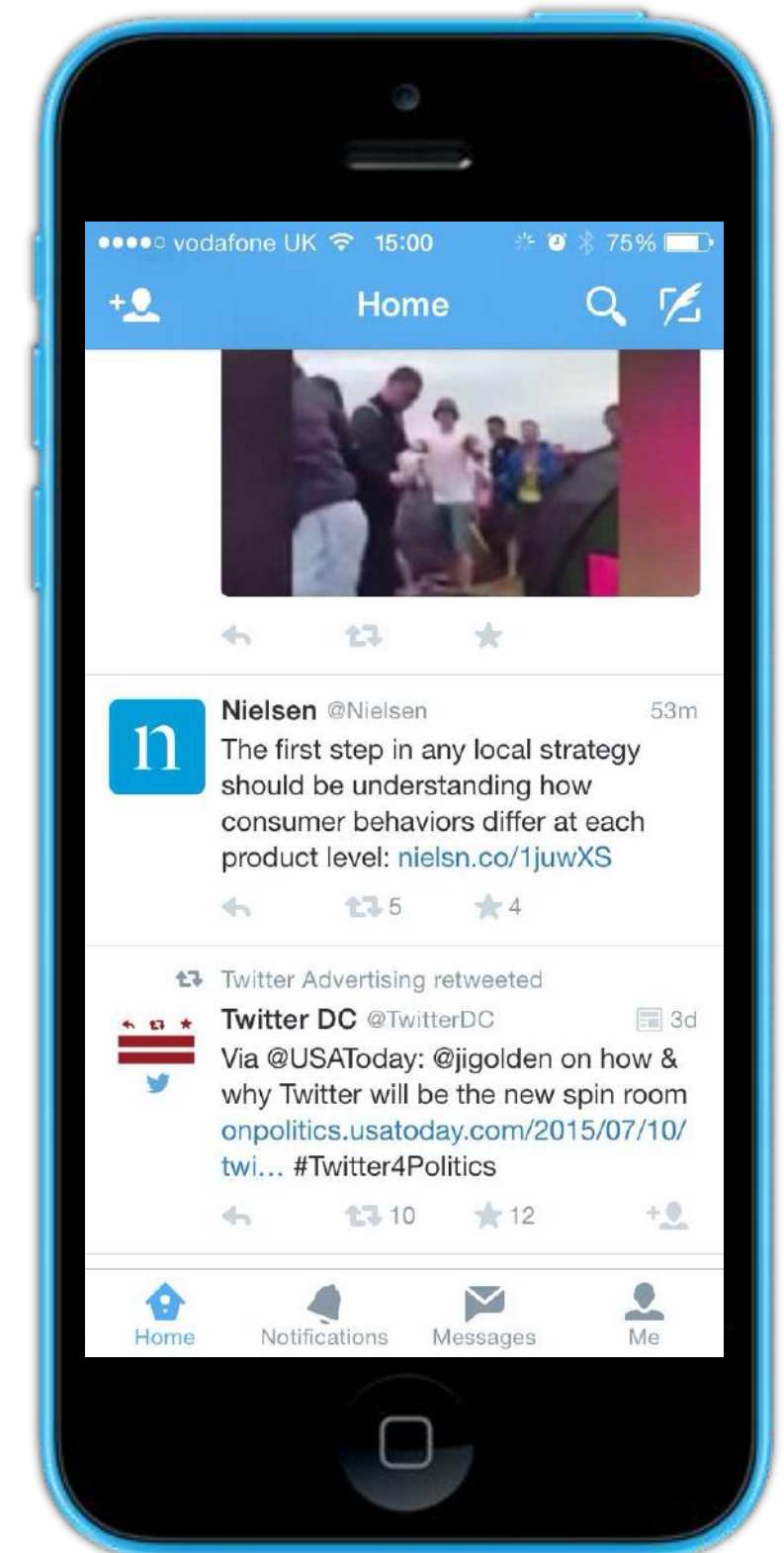
TWITTER INFLUENCES THROUGHOUT THE PURCHASE CYCLE

67% follow brands and companies on Twitter, with 18% following when considering a purchase



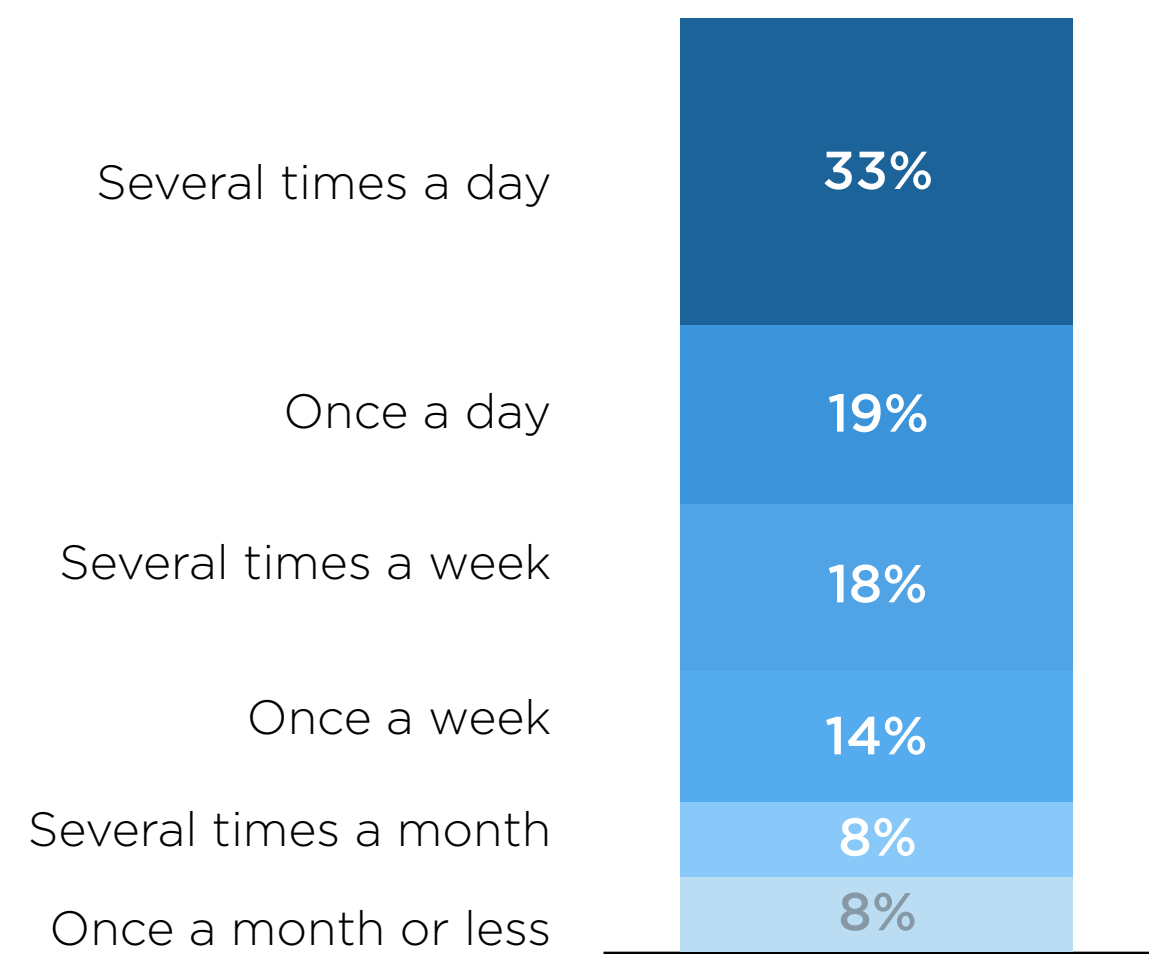
A SYMBIOTIC RELATIONSHIP WITH TV

41% use Twitter whilst watching TV, actively engaging around a variety of TV content and the brands advertised

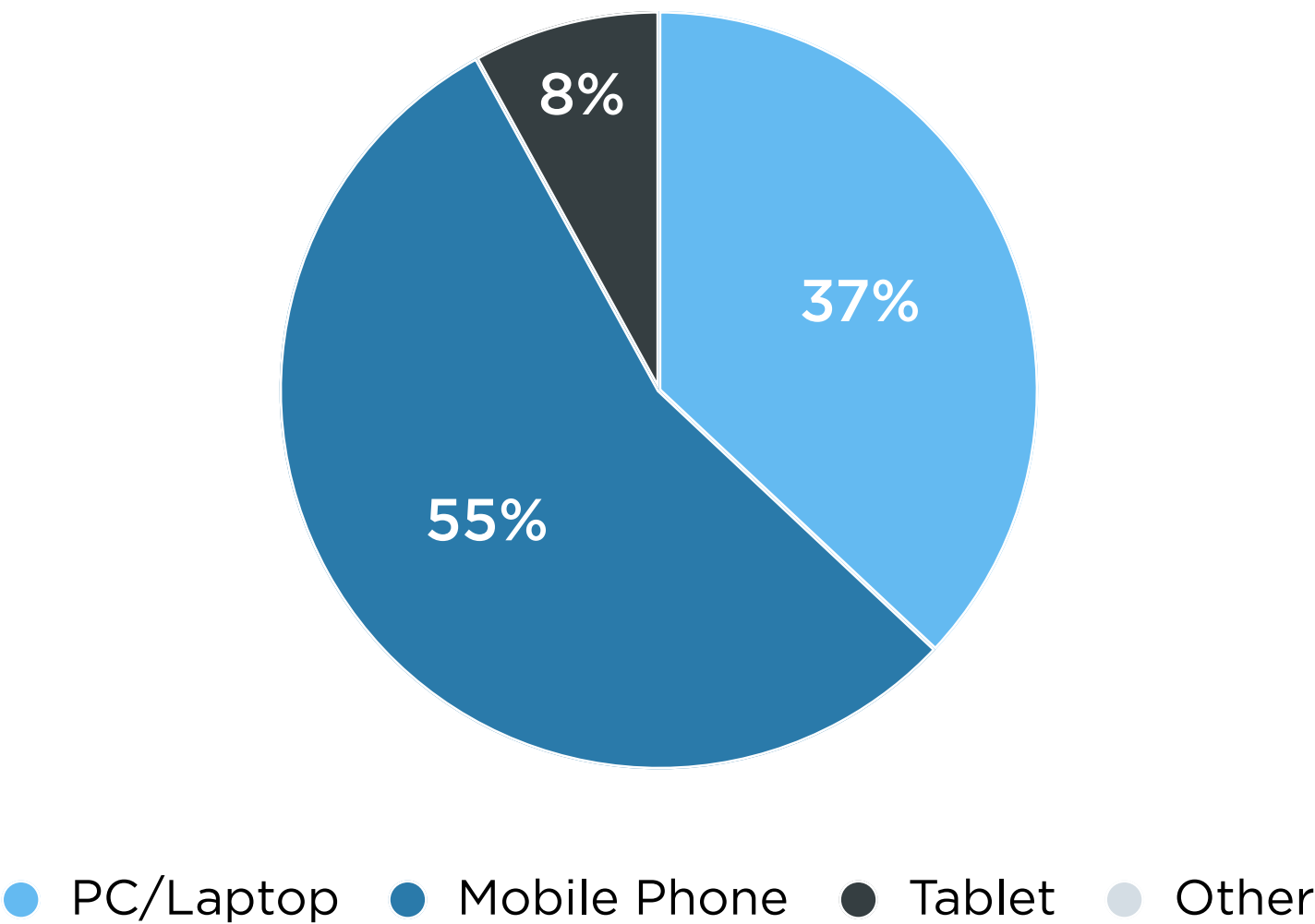


MOBILE IS THE MAIN TWITTER DEVICE FOR 55%

FREQUENCY OF USING TWITTER

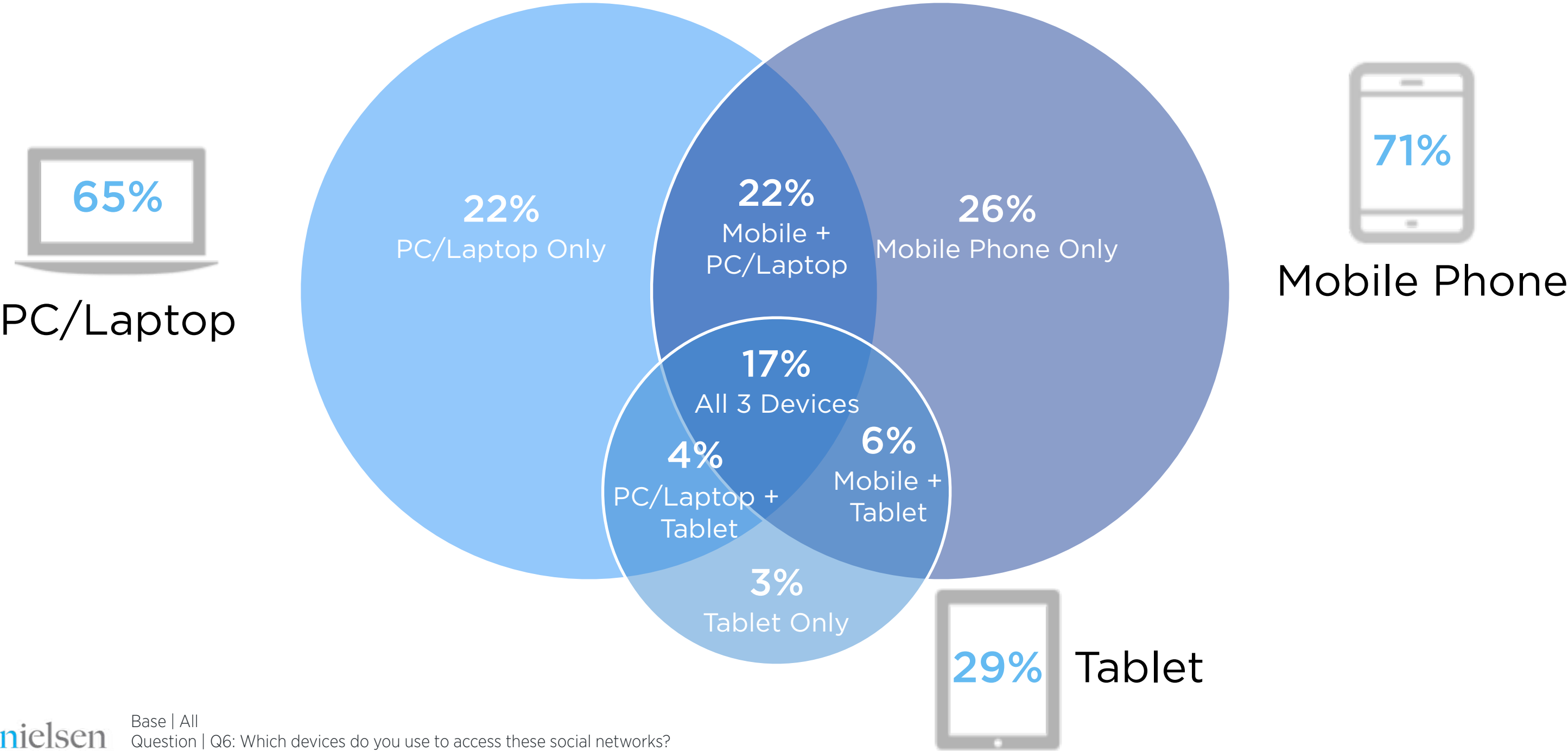


MAIN DEVICE TO ACCESS TWITTER



Base | All
Question | Q5: On average, how frequently do you use the following social networks? Q7: And, which device do you use MOST OFTEN to access these social networks?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

17% USE TWITTER ON ALL 3 DEVICES

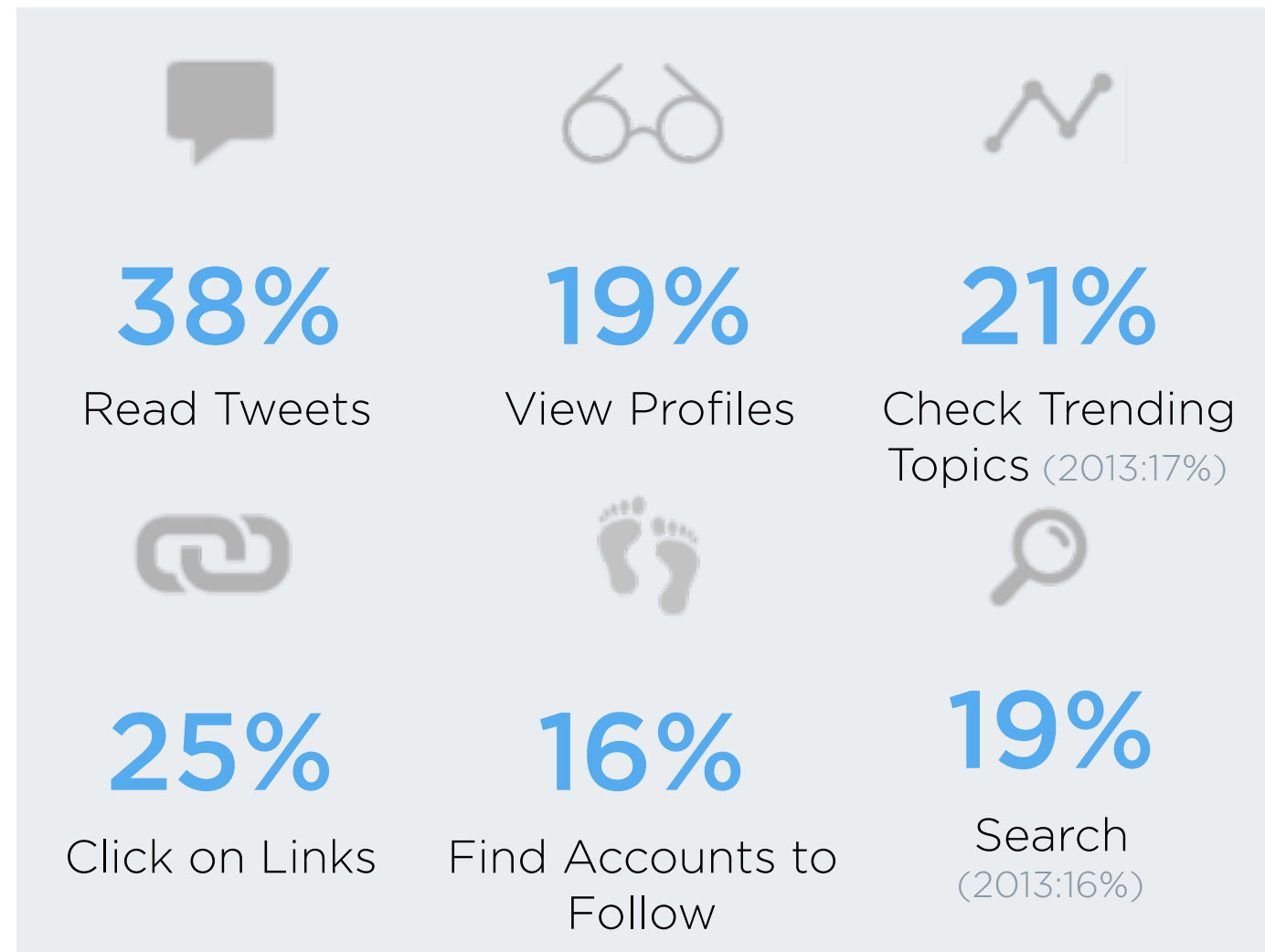


Base | All
Question | Q6: Which devices do you use to access these social networks?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

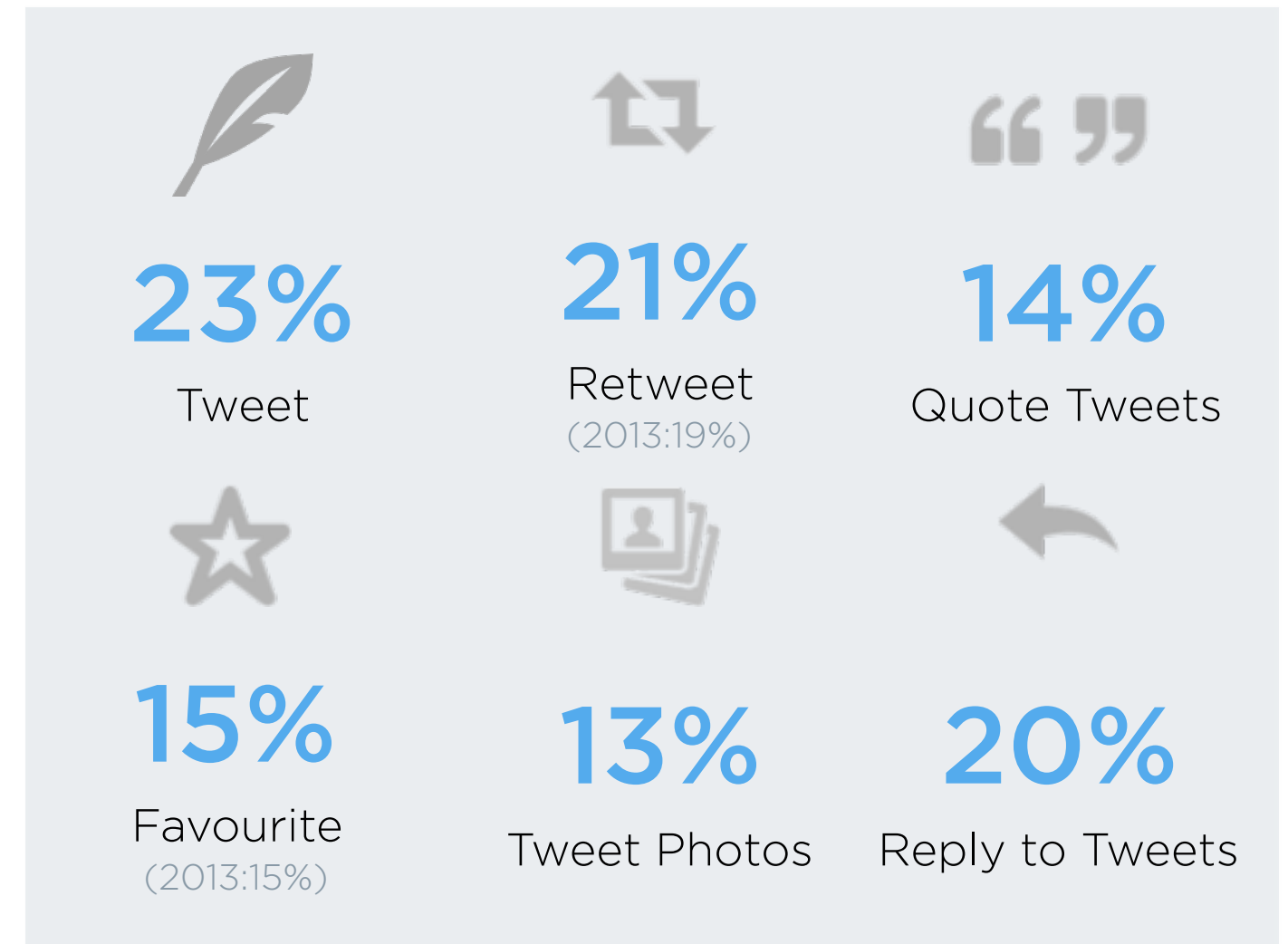
USERS DISCOVER AND ENGAGE ON A DAILY BASIS

ON A DAILY BASIS...

DISCOVER



ENGAGE



Base | All

Question | Q8: Thinking about Twitter specifically, how frequently do you do the following? Several times a day / Once a day

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands



ENGAGING THROUGH VIDEO

ON A DAILY BASIS TWITTER USERS...



19%

Watch
Videos

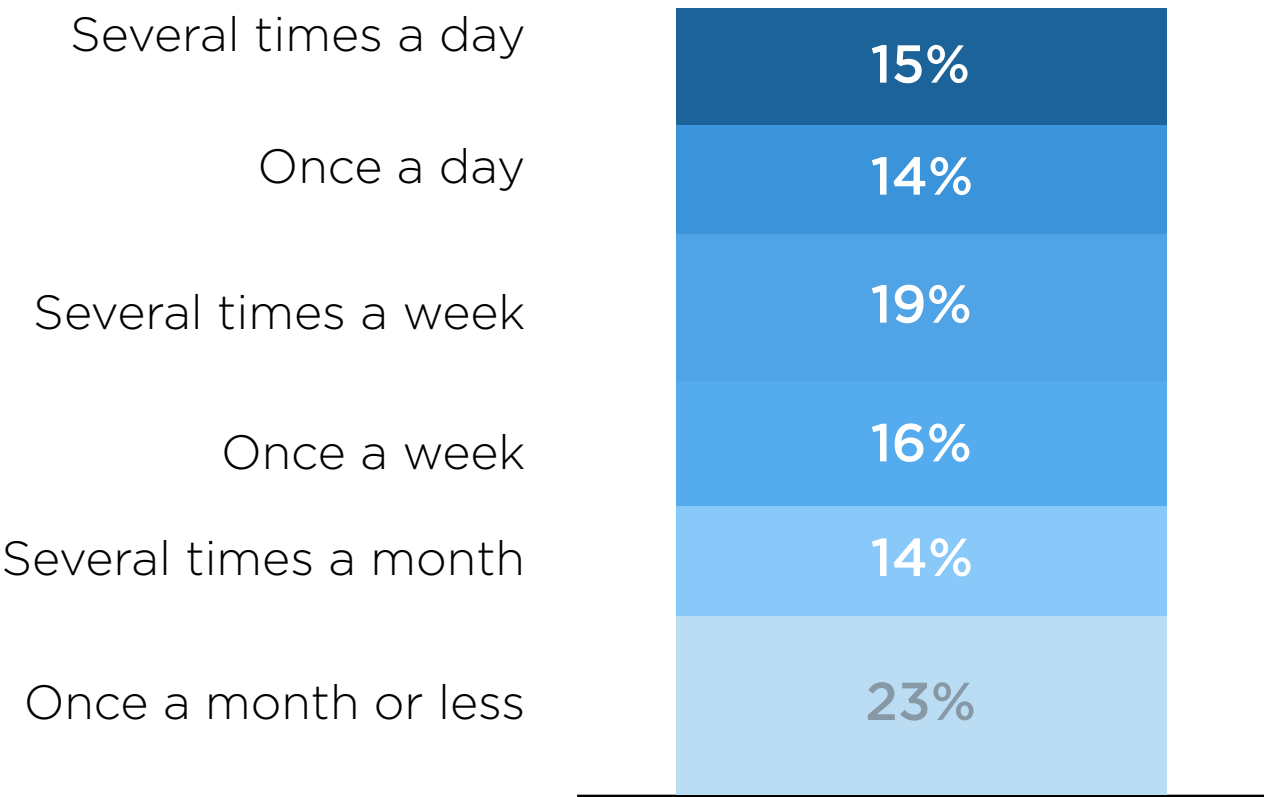
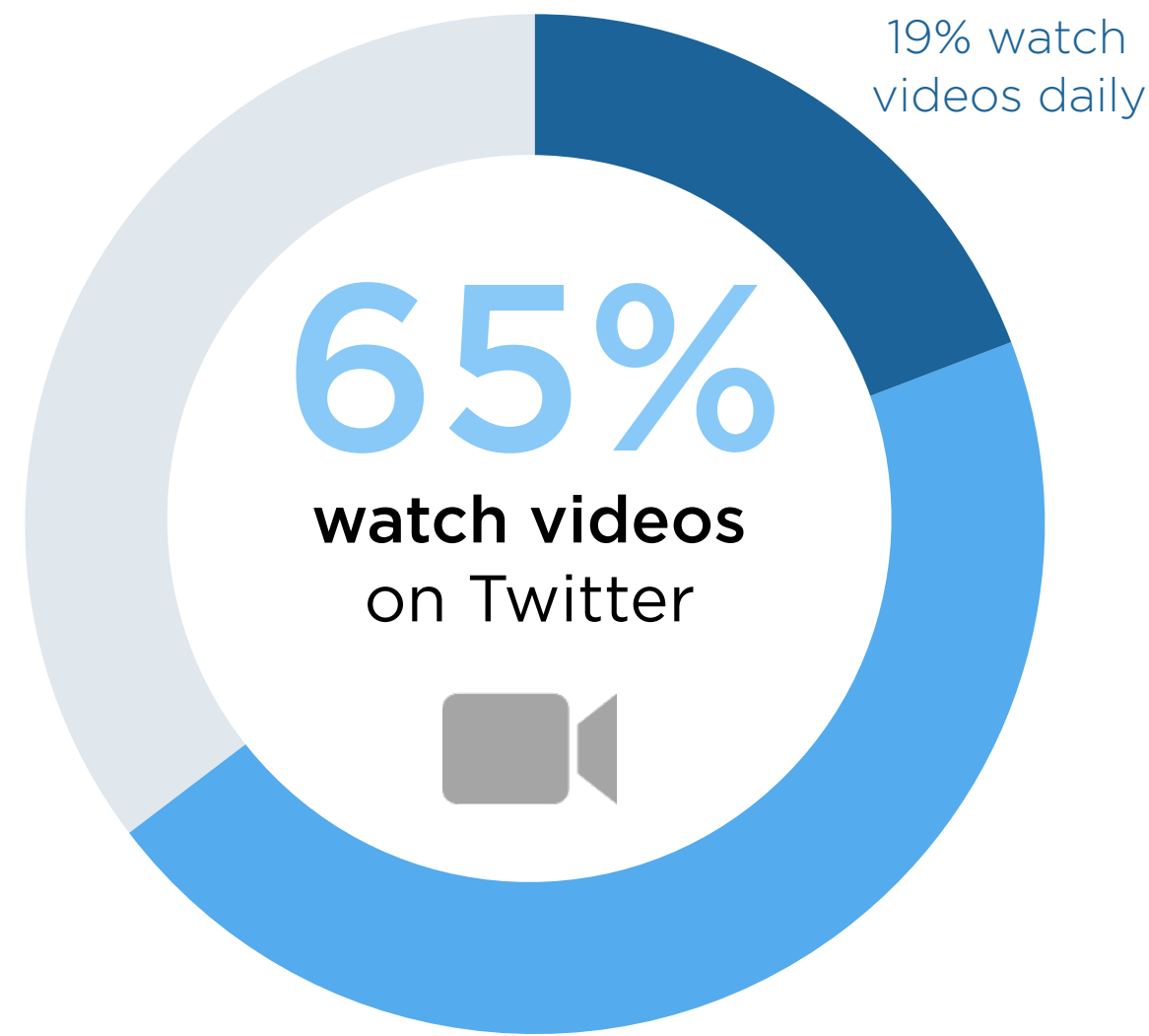


9%

Tweet
Videos

TWITTER CAPTIVATES THROUGH VIDEO

FREQUENCY THAT TWITTER VIDEO VIEWERS WATCH VIDEOS



Base | All & Twitter Video Viewers
Question | Q8: Thinking about Twitter specifically, how frequently do you do the following? Watch videos on your timeline
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

A HASHTAG HAS MANY FACES

TWITTER USERS ADOPT **HASHTAGS** ON A DAILY BASIS...



17%

Tweeting with
hashtags



17%

Follow official
hashtags



15%

Search for
hashtags to use



14%

Create their own
hashtags

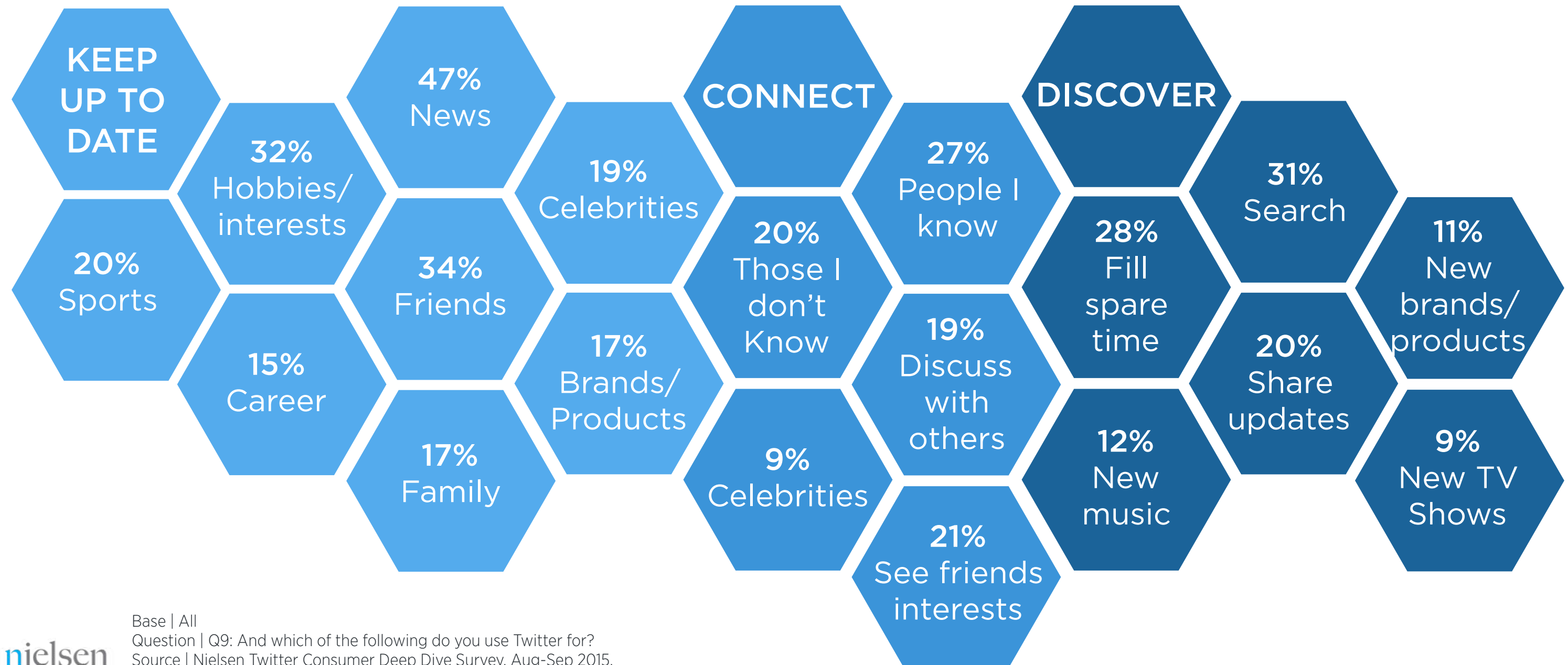


Base | All

Question | Q8: Thinking about Twitter specifically, how frequently do you do the following? Several times a day / Once a day

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

TWITTER IS USED TO KEEP UPDATED, TO CONNECT AND TO DISCOVER



ON THE GO AND IN THE MOMENT

TWITTER IS USED WHILST...



Commuting

30%

(2013:27%)



On holiday

31%



Travelling

28%



At a restaurant/
cafe/bar

20%



Hanging out
with friends

17%



At live events

20%

(2013:14%)



Shopping

16%

(2013:13%)



Visiting landmarks/
attractions

14%



At the cinema

12%



At the gym/
exercising

9%



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Base | All

Question | Q10. On weekdays and weekends, when during the day do you use Twitter?

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

BECOMING A HABIT IN THE ROUTINE

TWITTER IS USED WHILST...



Relaxing at home

55%



Watching TV

41%



After waking up

41%



Before bedtime

41%



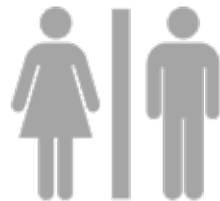
At work

35%



At breakfast

34%



On the toilet

29%



At school/university

18%



Cooking

16%



At the dinner table

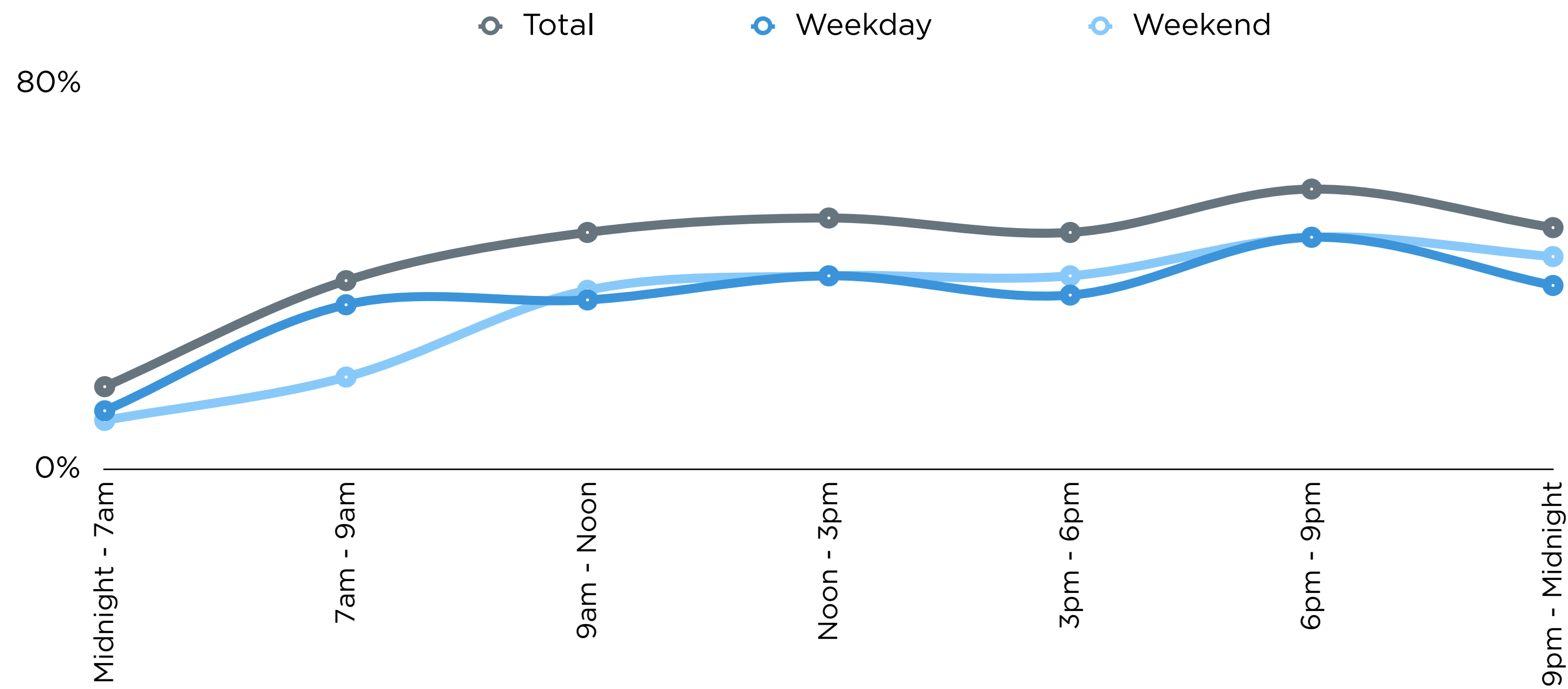
17%



nielsen

Base | All
Question | Q10. On weekdays and weekends, when during the day do you use Twitter?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

ENGAGEMENT PEAKS IN THE EVENING



Base | All
Question | Q11. And when during the day do you use Twitter?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

TWITTER USERS HAVE A POSITIVE OUTLOOK ON LIFE

Agreeing that...

67%

like **new technology**

55%

are **confident** about their future

45%

are confident about their **countries economy**

57%

like to try **new brands and products**

57%

spend lots of time on **leisure activities**

70%

look for the **highest quality standard** when purchasing

19%

are **influenced easily** by others' opinions

26%

like to **spend money** without budgeting



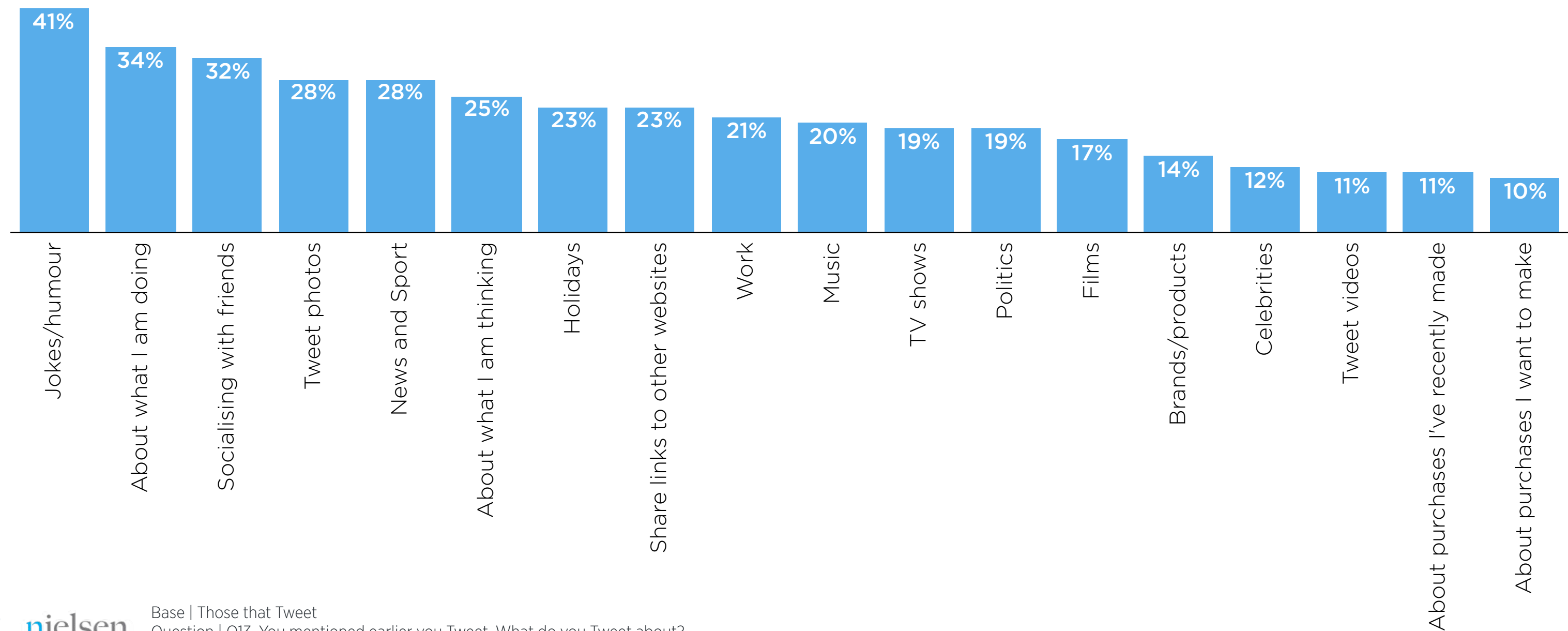
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Base | All

Question | Q57 & Q58 To what extent do you agree or disagree with the following statements about yourself? Strongly agree / somewhat agree

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

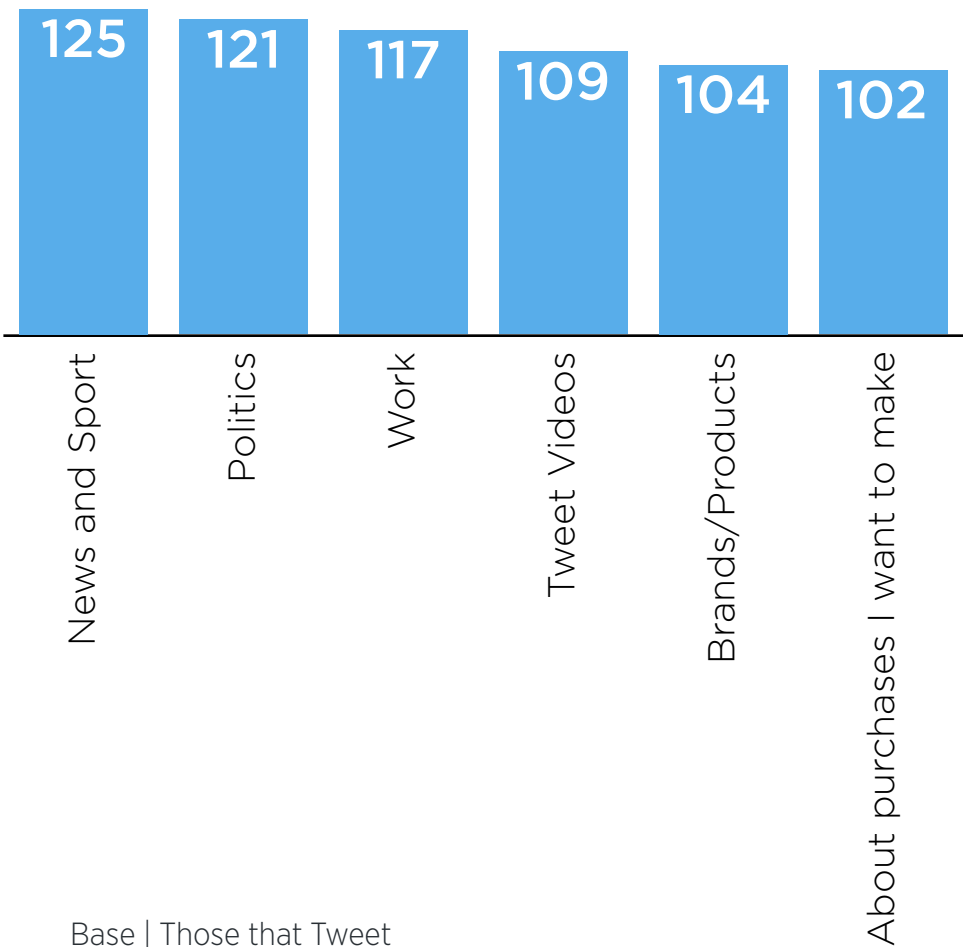
TWITTER USERS TWEET ABOUT JOKES AND WHAT THEY ARE DOING



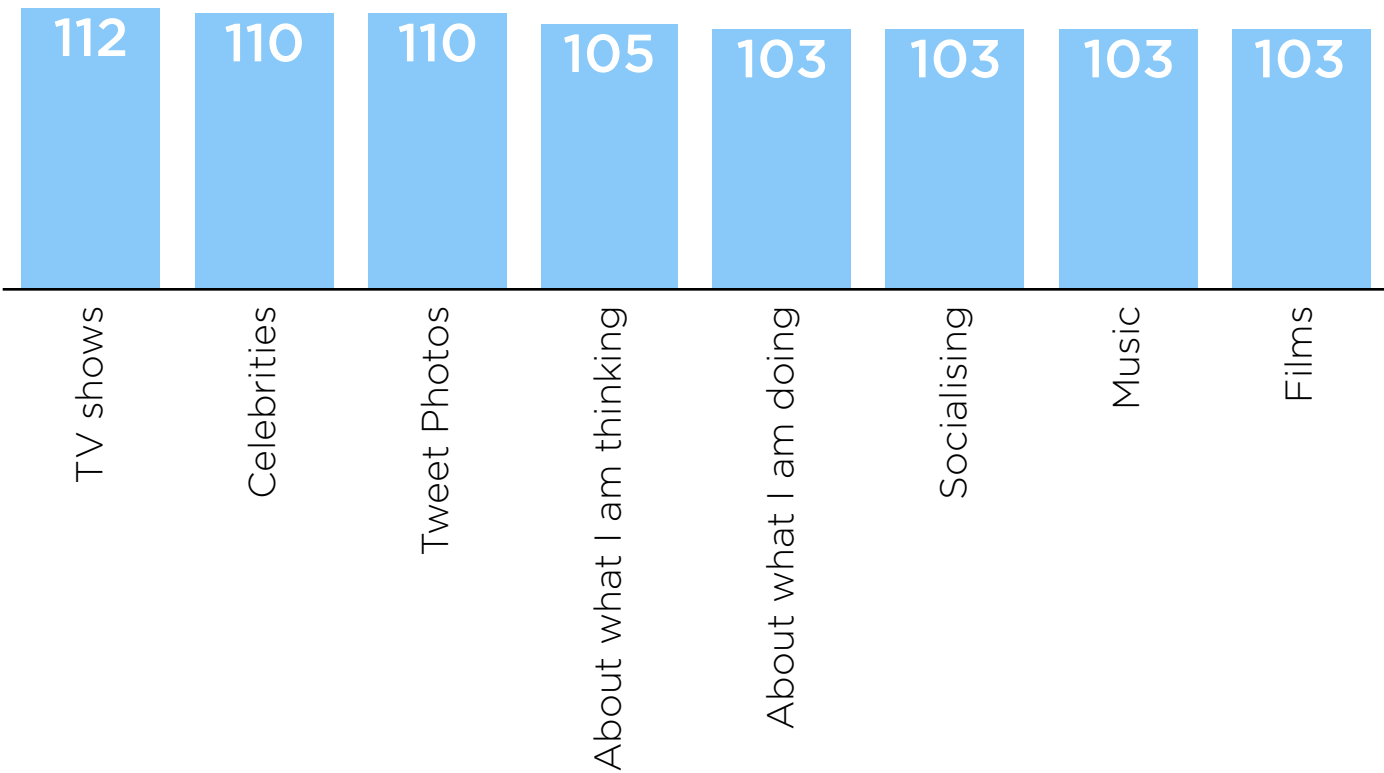
MEN TWEET ABOUT NEWS, SPORTS AND POLITICS

Women are more likely to Tweet about TV, celebrities and photos

MEN ARE MORE LIKELY TO TWEET ABOUT

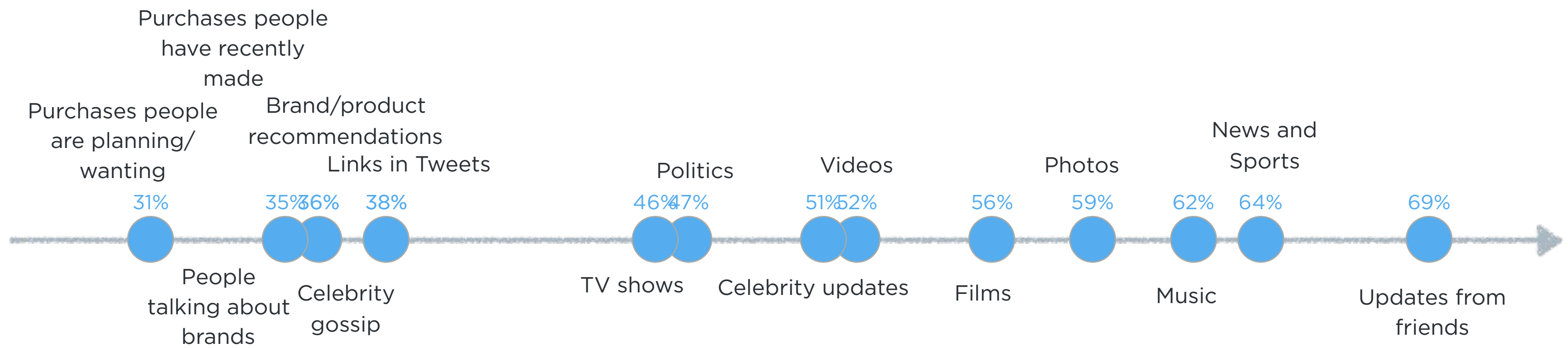


WOMEN ARE MORE LIKELY TO TWEET ABOUT



Base | Those that Tweet
Question | Q13. You mentioned earlier you Tweet. What do you Tweet about? Index versus Total Twitter user
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

USERS ENJOY AN ARRAY OF CONTENT ON TWITTER



WOMEN ARE MORE LIKELY TO ENJOY....

Celebrity gossip (124)

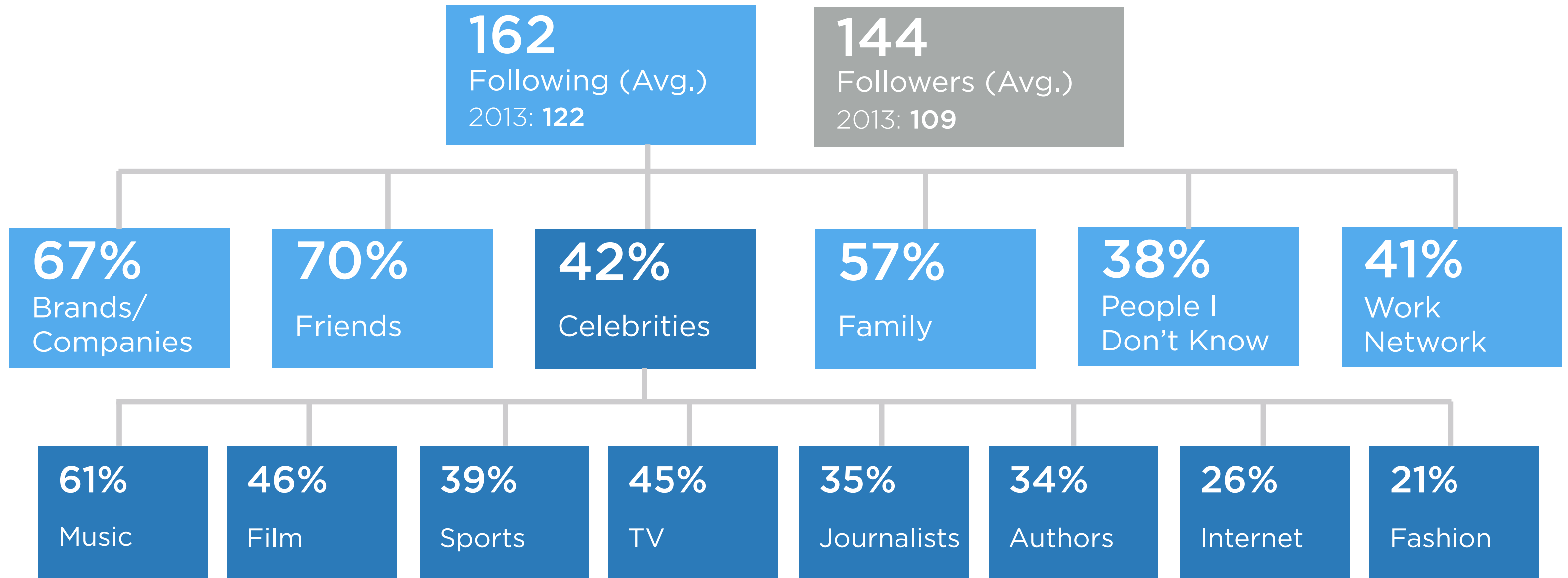
Celebrity updates (117)

MEN ARE MORE LIKELY TO ENJOY....

Ads (118)

Brands and products(107)

OVER 2 IN 3 FOLLOW BRANDS ON TWITTER

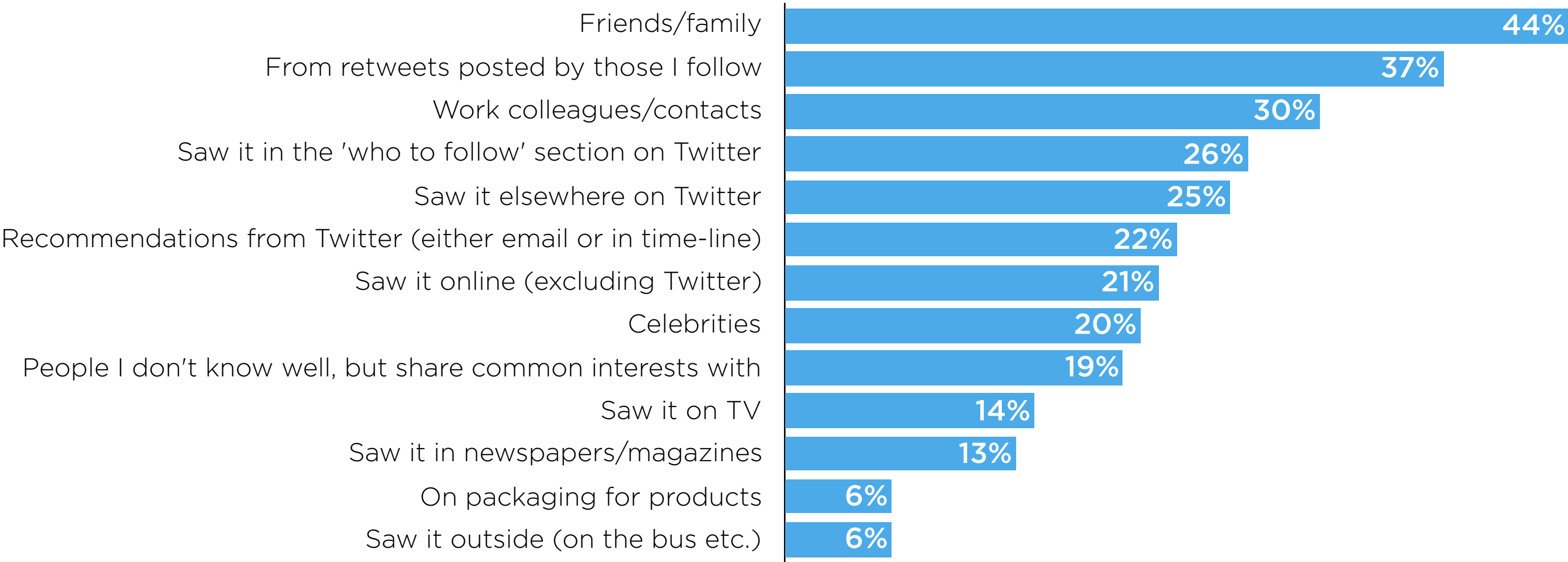


Base | All
Question | Q50. Please select the following types of Twitter accounts/people that you follow. Q18a. What types of celebrities are you following? Q17. Thinking specifically about the personal account you use the most on Twitter, please tell us how many Twitter accounts/people that I follow / Follow me
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands



FRIENDS, FAMILY AND RETWEETS ARE INFLUENTIAL IN DISCOVERING WHO TO FOLLOW

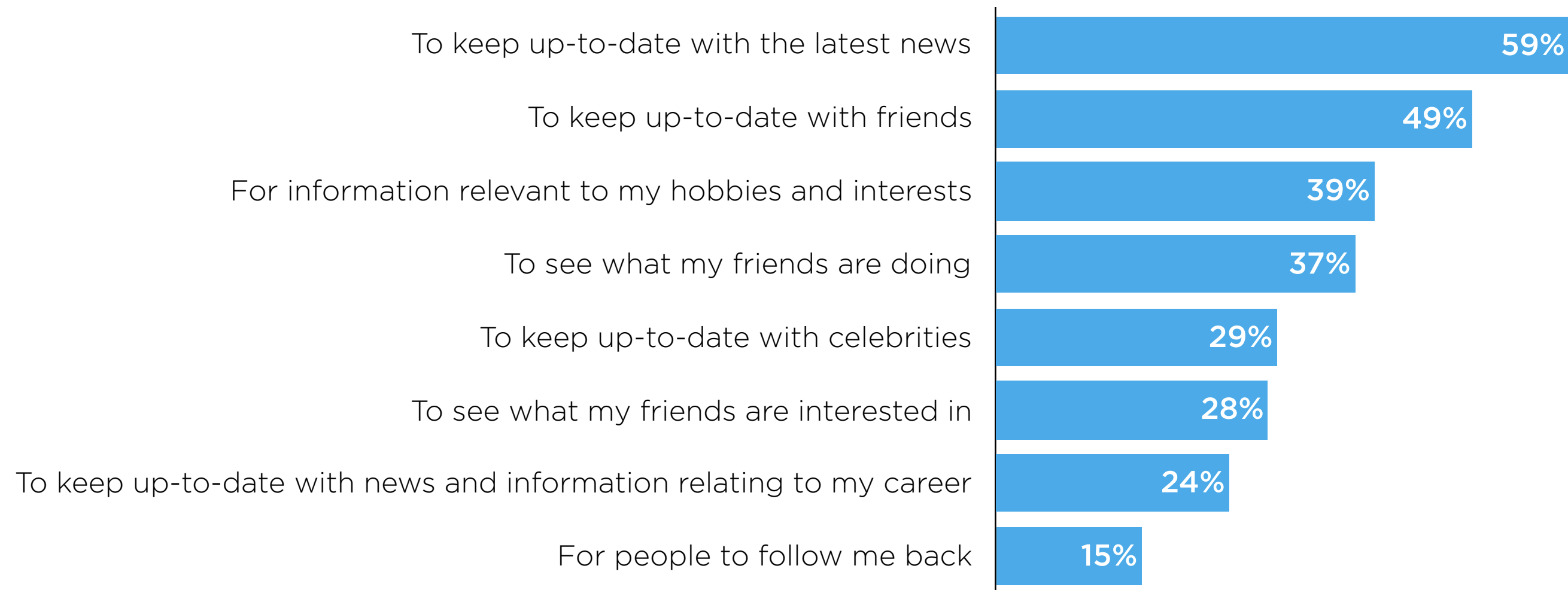
DISCOVER WHO TO FOLLOW THROUGH



WHY FOLLOW?

For the latest news, hobbies and interests

WHY USERS FOLLOW...



Base | Followers
Question | Q20. Which of the following describes why you follow certain accounts/people on Twitter
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

HEAVY USERS DEMONSTRATE STRONG ENGAGEMENT

52% use Twitter at least once a day. These heavy users engage on a daily basis by...

DISCOVER



65%

Read Tweets



31%

View Profiles



43%

Click on Links



31%

Search

ENGAGE



37%

Tweet



33%

Retweet



25%

Favourite



22%

Tweet Photos

VIDEO



15%

Tweet Videos



31%

Watch Videos



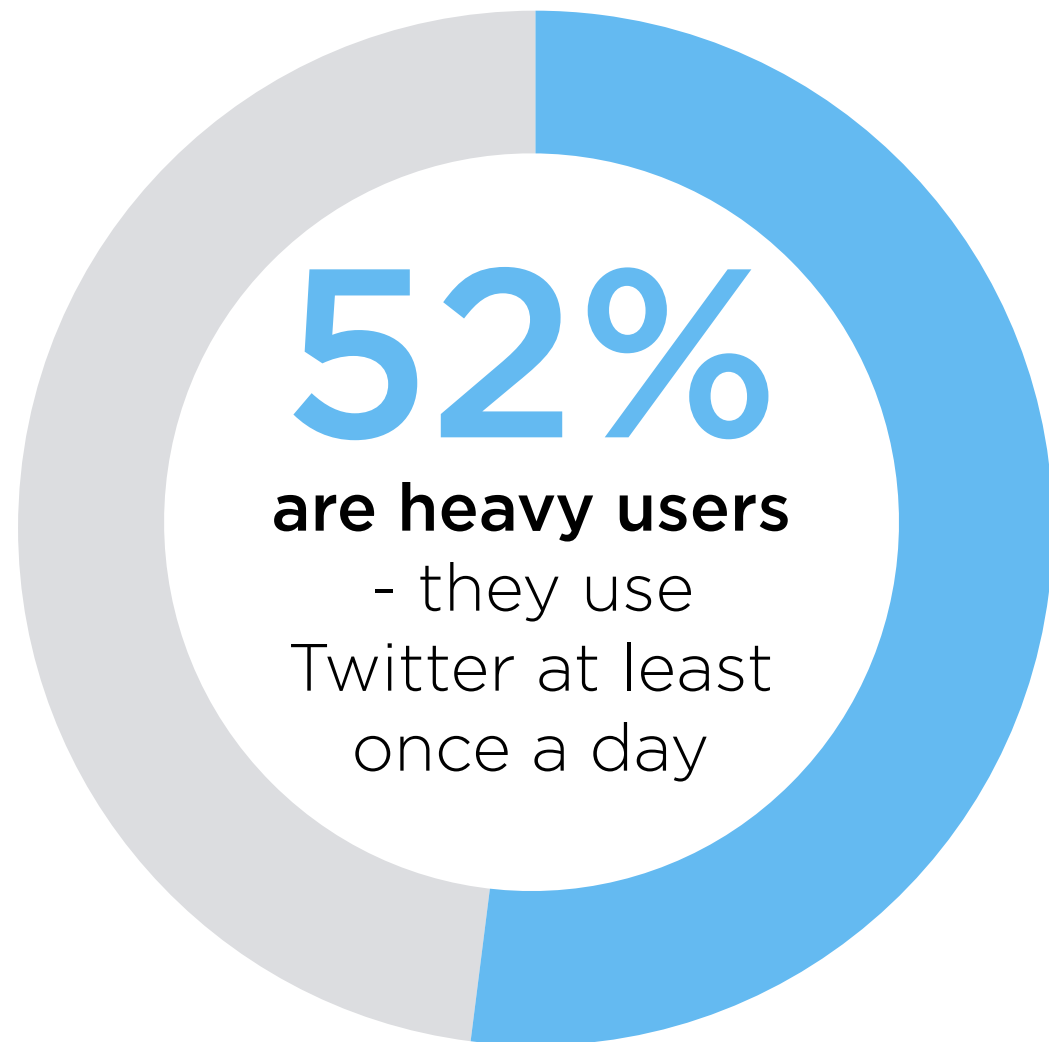
Base | Heavy Twitter Users (Use Twitter several times a day or once a day)

Question | Q8: Thinking about Twitter specifically, how frequently do you do the following? Several times a day / Once a day

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

CAPITALISING WITH THE MOST ENGAGED

AMONGST **HEAVY USERS...**



OPPORTUNITY

- 17%** shop **in-store or online** at least once a week (Index: **114**)
- 46%** intend to **travel for leisure** in the next 12 months
- 60%** like to **try new brands & products** (Index: **105**)

INTERRUPT

- 52%** use Twitter whilst **watching TV** (Index: **127**)
- 70%** use a **mobile device** as the main way to access Twitter (Index: **112**)
- 39%** **view ads** on Twitter at least once a week (Index: **130**)



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Base | Heavy Twitter Users (Use Twitter several times a day or once a day)
Question | Q5, Q7, Q8, Q10, Q57, Q63, Q65 (Full questions in notes) Index against Total Twitter user
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

CAPTIVATING THROUGH VINE

52% of Netherlands Twitter
users watch Vine videos

7% have an active Vine
account



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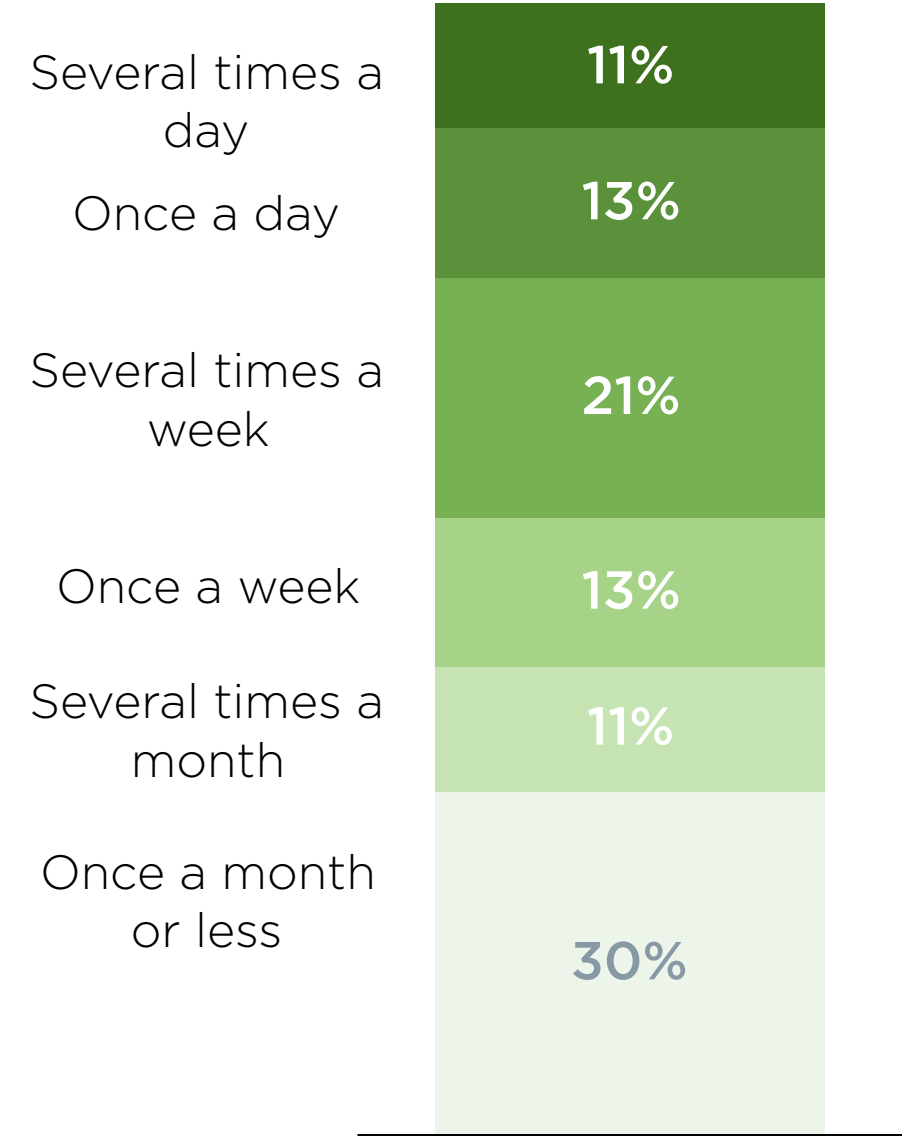
Base | All

Question | Q3. With which of the following social networking sites do you have an account and have used in the past 30 days? Q45. How often do watch Vine videos?

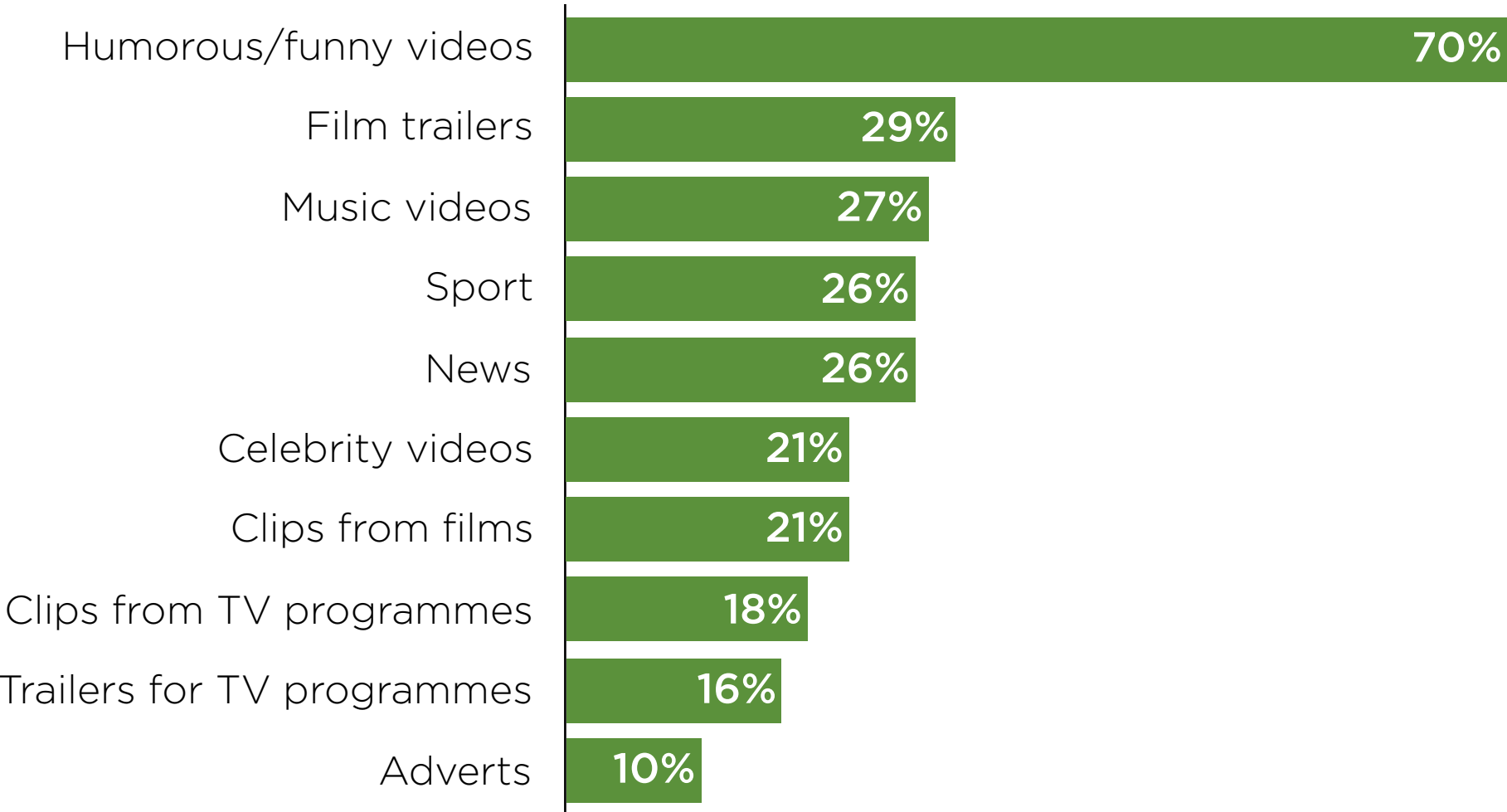
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

HUMOUR DRIVES CONSUMPTION OF VINE CONTENT

FREQUENCY OF WATCHING VINE VIDEOS



TYPES OF VINE VIDEOS WATCHED



Base | Twitter users who watch Vine videos
Question | Q45. How often do watch Vine videos? Q46. What types of Vine videos do you watch?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

MOBILE

#DEEPDIVE2015

MOBILE IS AT THE FOUNDATION OF TWITTER

63% use a mobile device as their main way to access Twitter (2013: 55%)

Mobile-first users are **16%** more likely to engage several times a day than the average user

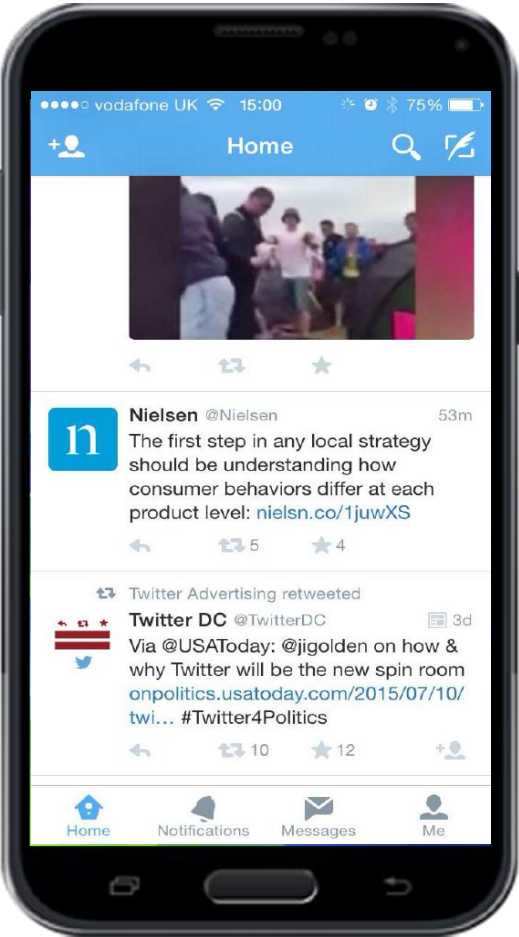
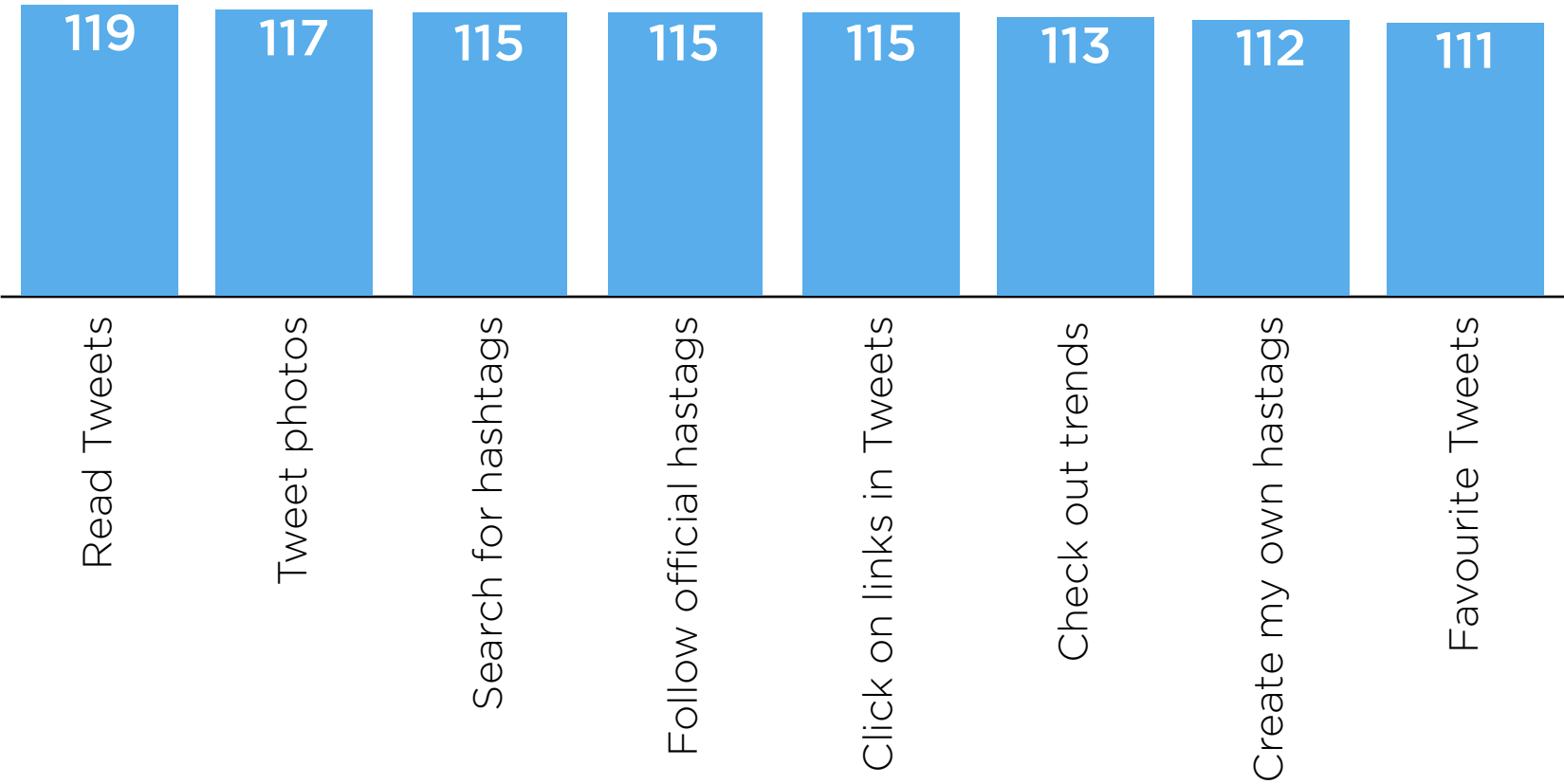


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Base | All & Twitter Mobile-First Users (Main device = Smartphone or Tablet)
Question | Q7. And, which device do you use MOST OFTEN to access these social networks? Q5.
On average, how frequently do you use the following social networks?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

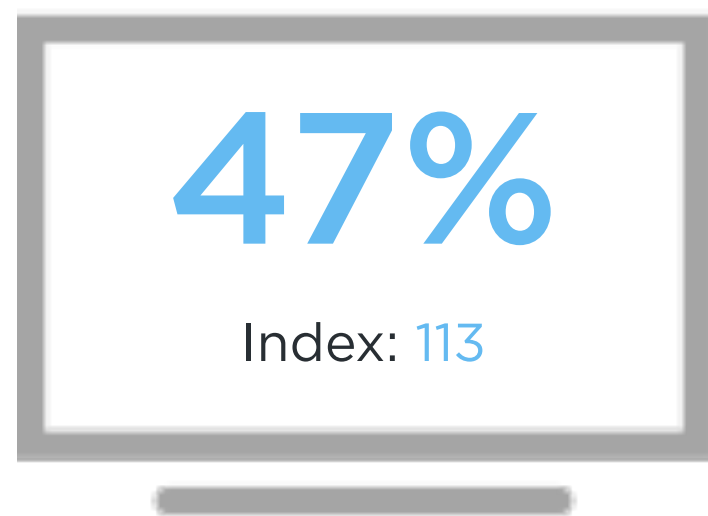
MOBILE USERS ARE MORE LIKELY TO ENGAGE ACROSS VARIOUS FUNCTIONS

TWITTER MOBILE-FIRST USERS | DAILY ACTIVITY INDEX VS TOTAL TWITTER USER

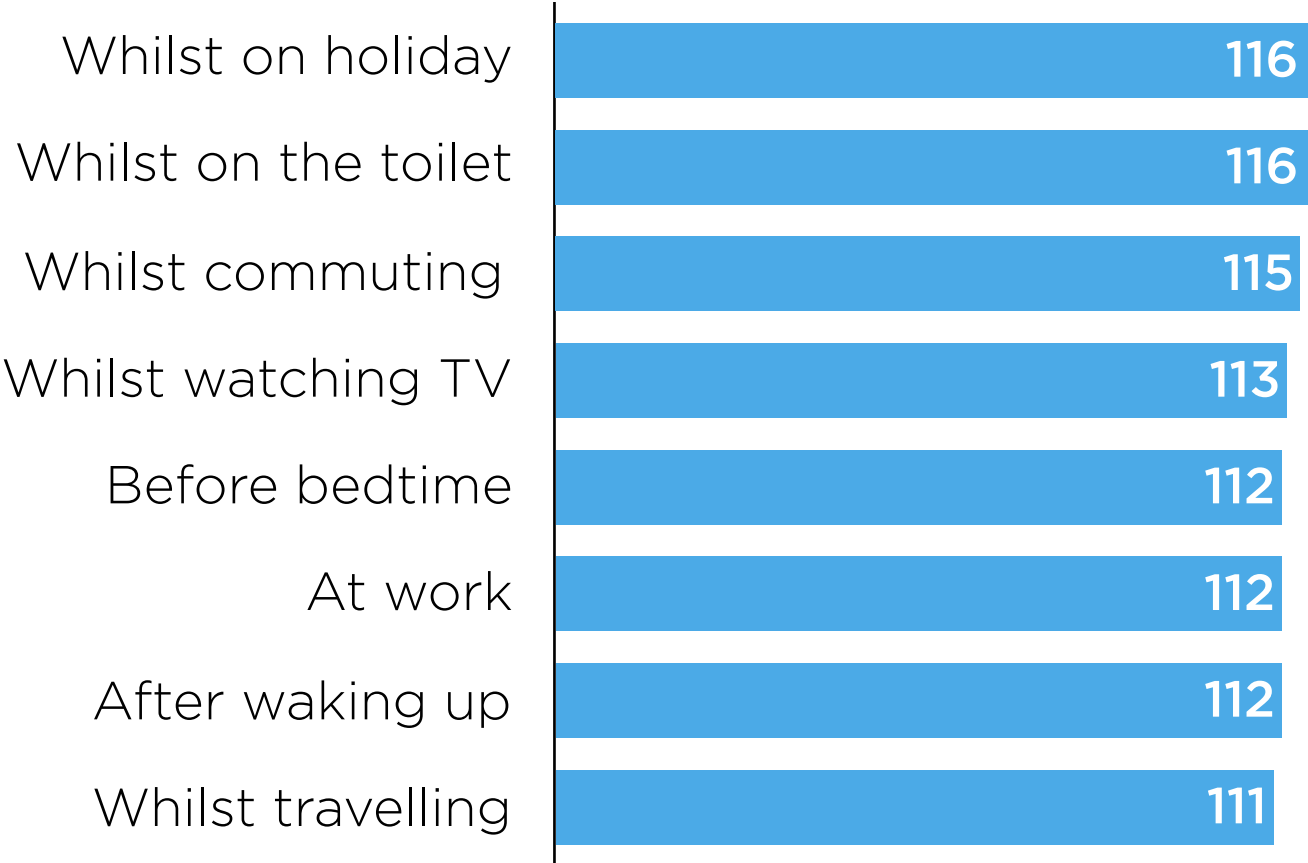


TWITTER INTERJECTS MORE HEAVILY IN THE LIVES OF MOBILE-FIRST USERS

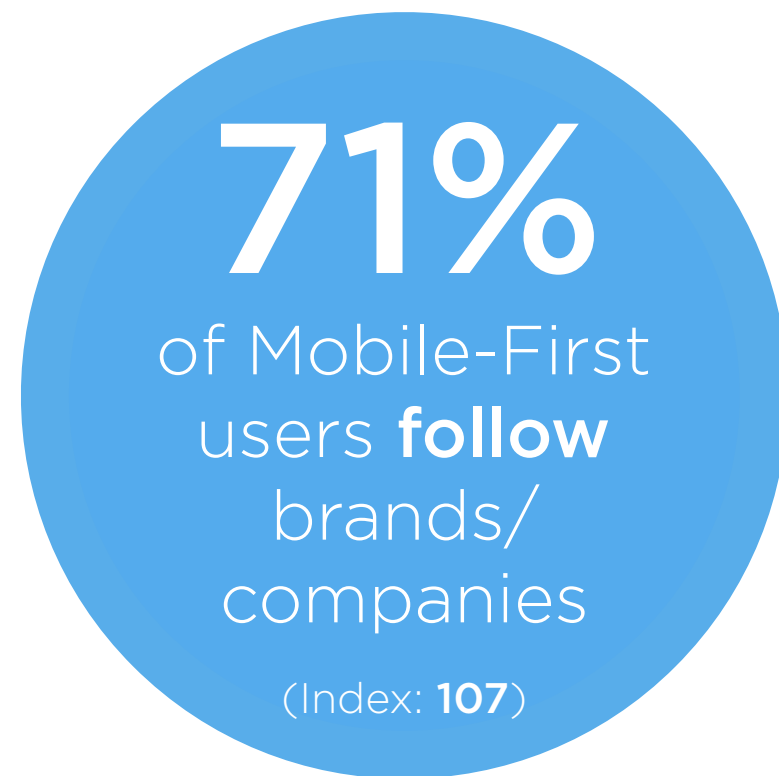
TWITTER **MOBILE-FIRST USERS** | DAILY ACTIVITY
INDEX VS TOTAL TWITTER USER



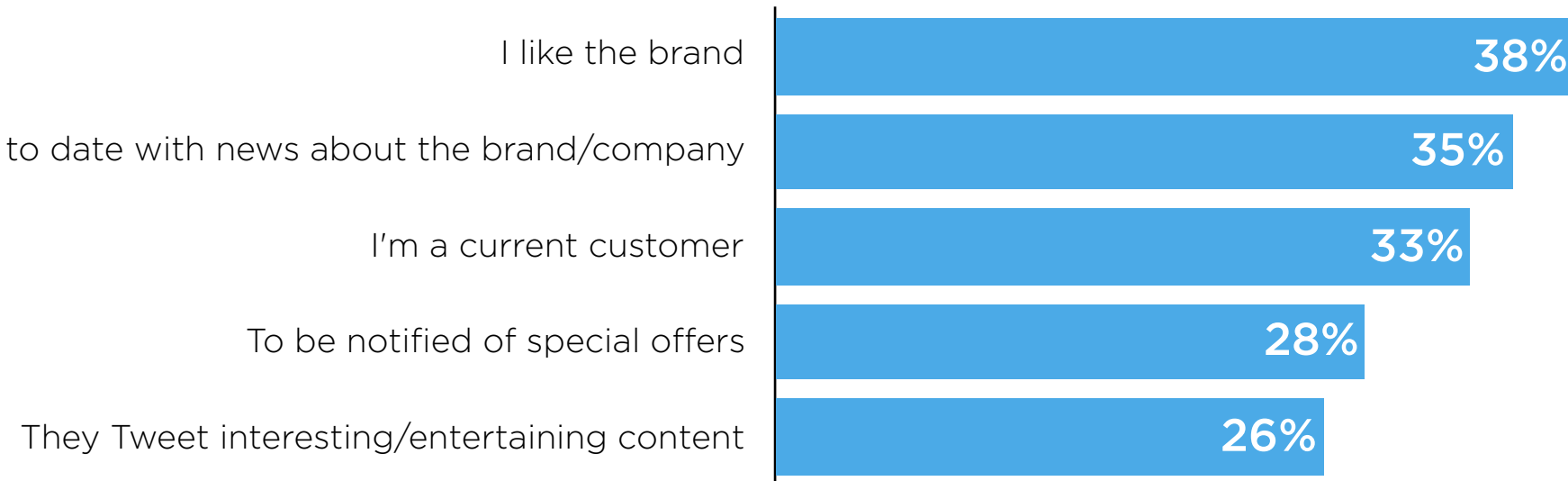
of Twitter mobile-first users use Twitter whilst **watching TV**



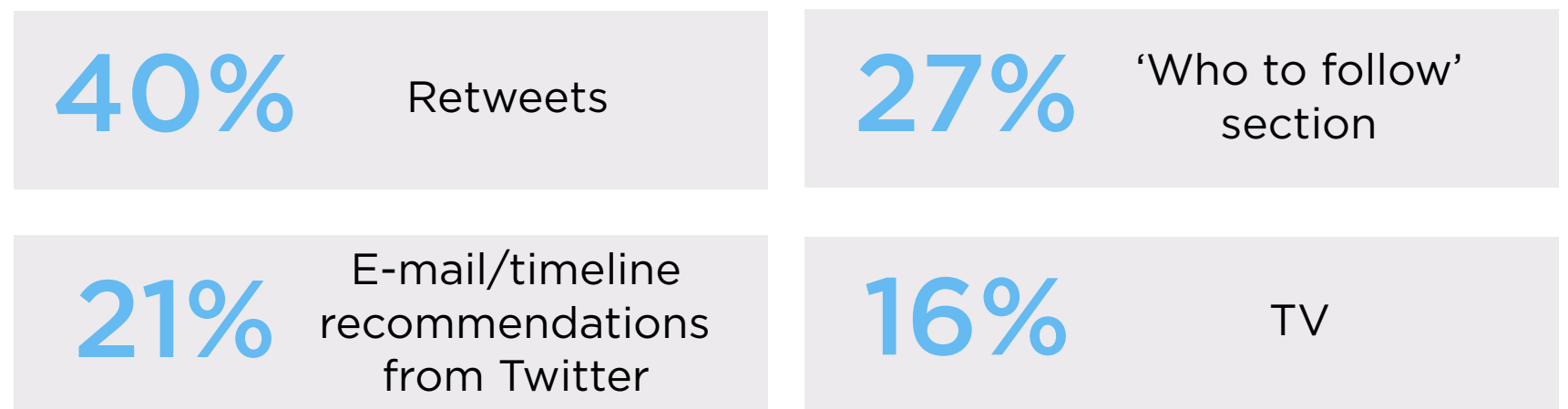
TELL A LASTING STORY ON MOBILE



WHY MOBILE USERS FOLLOW BRANDS

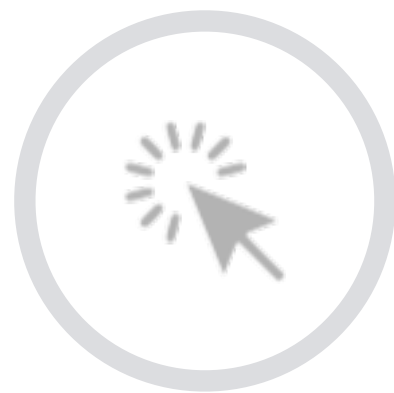


HOW MOBILE USERS **DISCOVER** WHO TO FOLLOW



CONVERTING EXPOSURE

AS A RESULT OF FOLLOWING BRANDS/COMPANIES ON TWITTER,
MOBILE-FIRST USERS...



31%

visited a brand
website



13%

looked at
**reviews/
recommendations**



1 in 5

have
searched for a
brand online



21%

found out **more
information** about
a brand



17%

purchased
brands/products



20%

have Tweeted
about a **positive
experience**



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Base | Twitter Mobile-First Users (Main device = Smartphone or Tablet) who follow brands/companies
Question | Q29. As a result of following brands/companies on Twitter, have you done any of the following?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

BRANDS

#DEEPDIVE2015

TWITTER INFLUENCES THROUGHOUT THE PURCHASE CYCLE

67% of Twitter users follow brands/companies

18% follow a brand when considering a purchase



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.....

Base | All

Question | Q50: Please select the following types of Twitter accounts/people that you follow

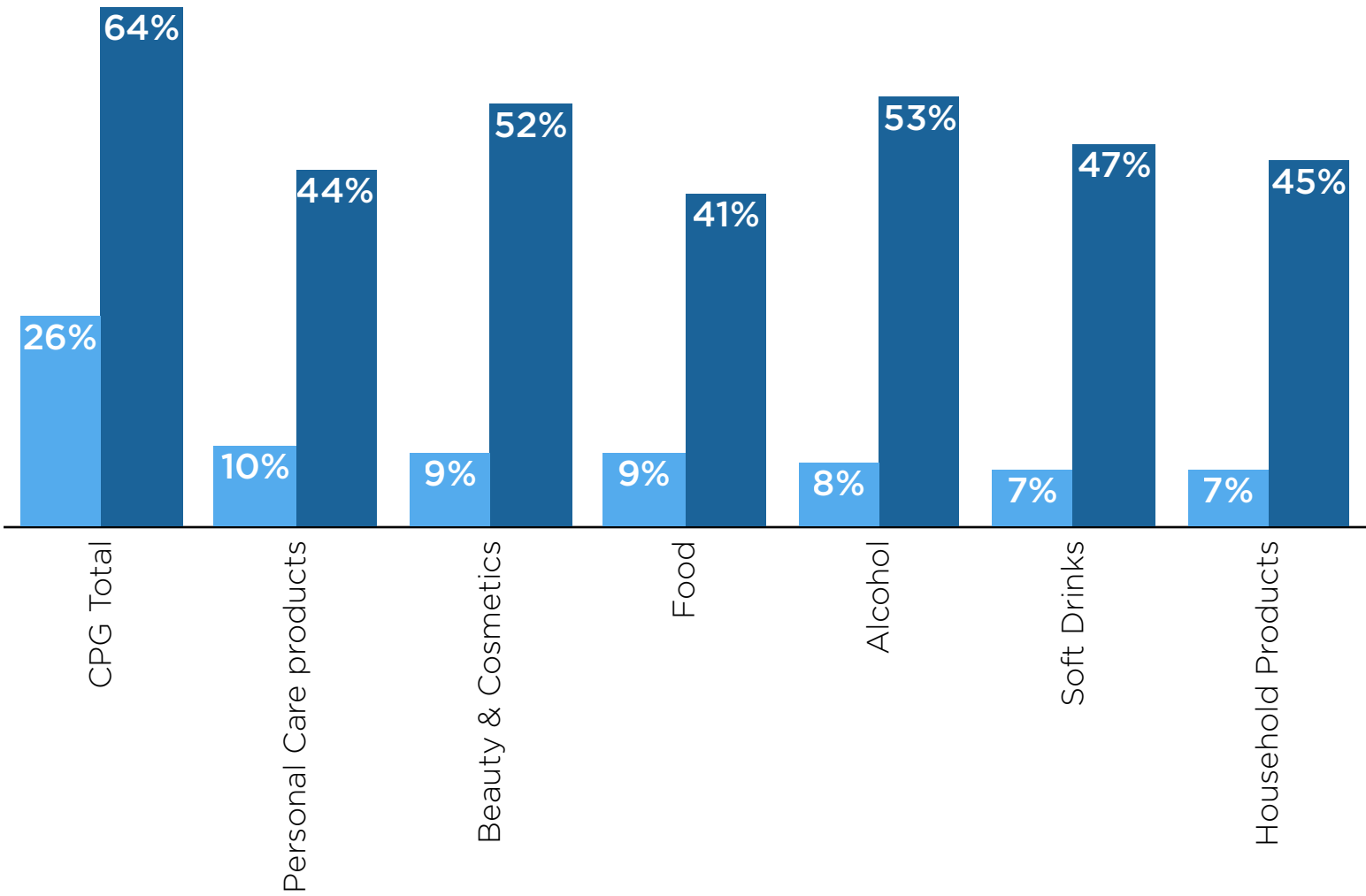
Base | Brand followers Q25: Why do you follow brands/companies on Twitter?

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

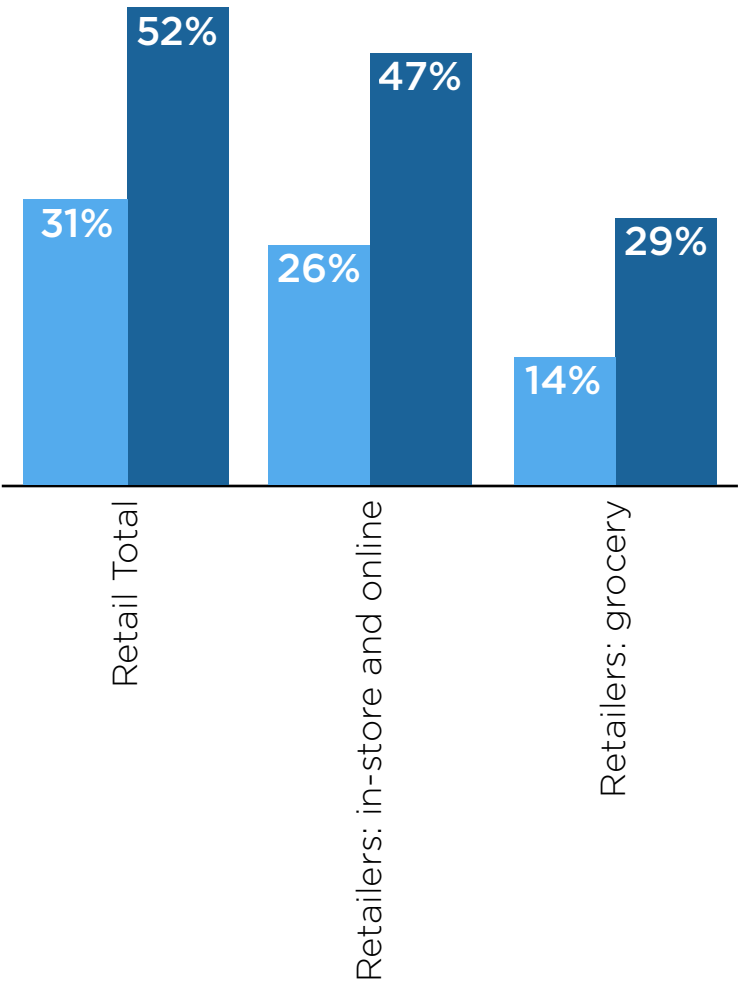
TWITTER USERS FOLLOW A WIDE RANGE OF BRANDS



Follow Want to hear from



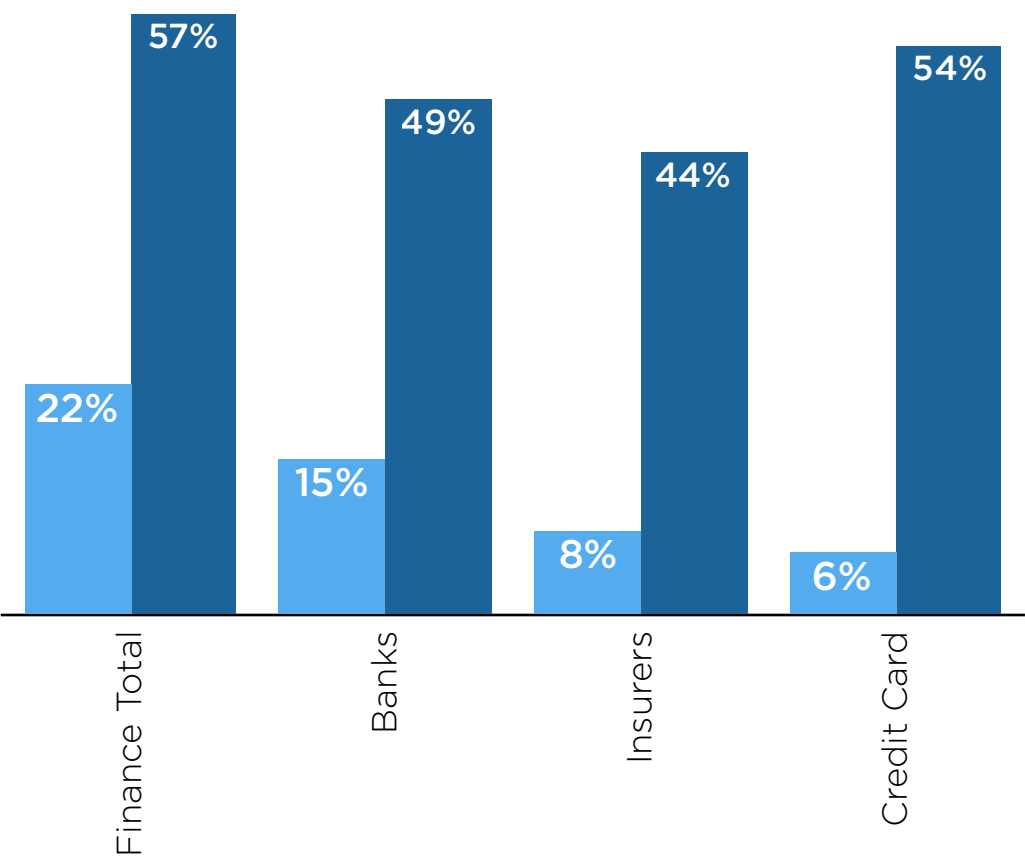
Follow Want to hear from



TWITTER USERS FOLLOW A WIDE RANGE OF BRANDS

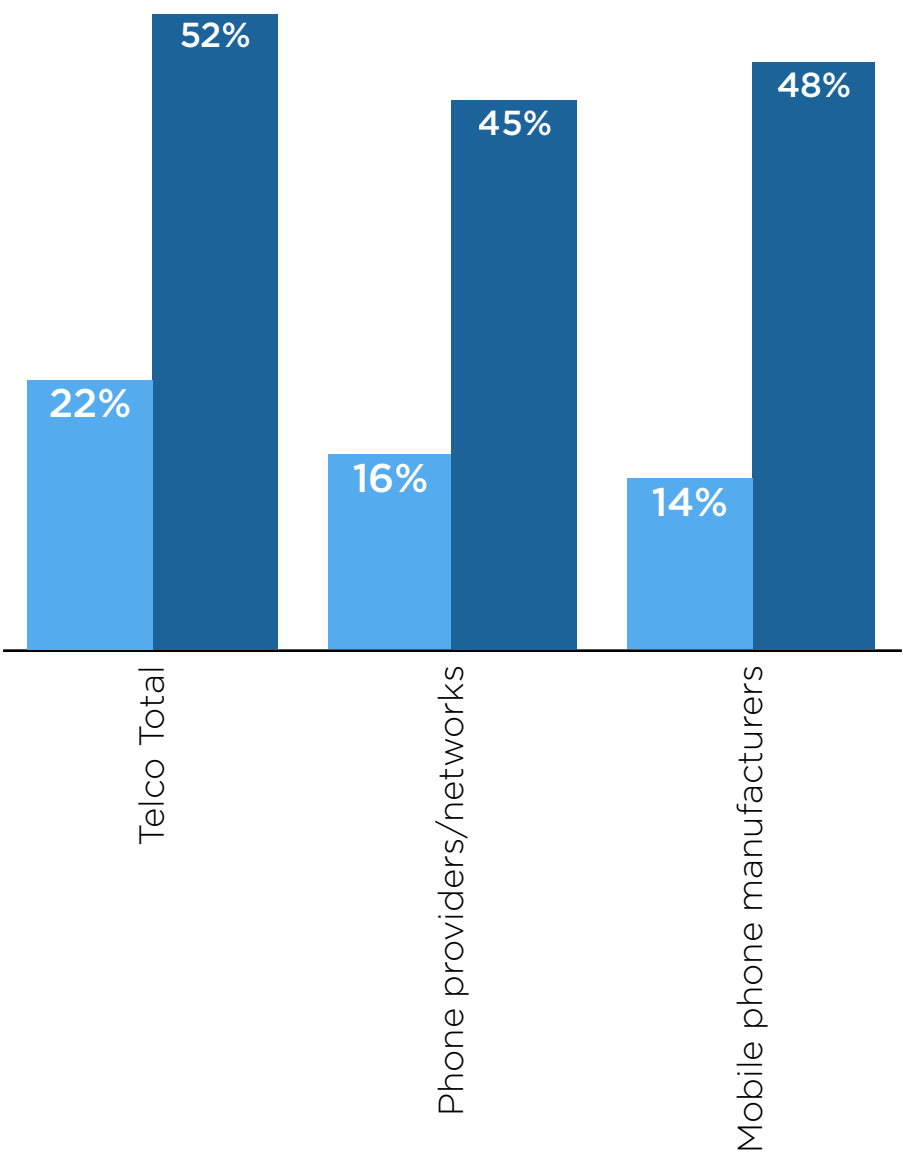
Finance

Follow Want to hear from



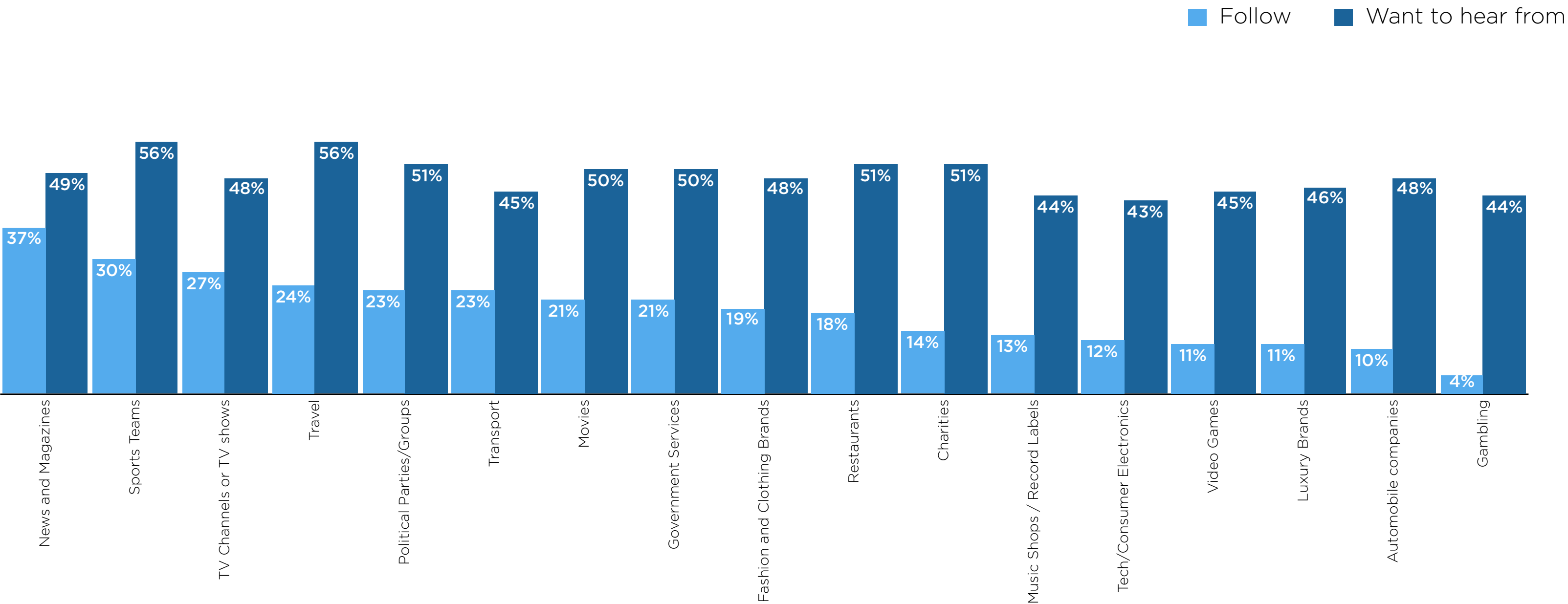
Telco

Follow Want to hear from



Base | Brand followers
Question | Q50: Please select the following types of Twitter accounts/people that you follow
Base| Category brand followers Q51: Below are a variety of types of accounts or people that are on Twitter.
In the future, which of the following do you want to hear from on Twitter?
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

TWITTER USERS FOLLOW A WIDE RANGE OF BRANDS



MOST LIKELY REASONS TO FOLLOW BRANDS ARE AFFINITY AND PROMOTIONS

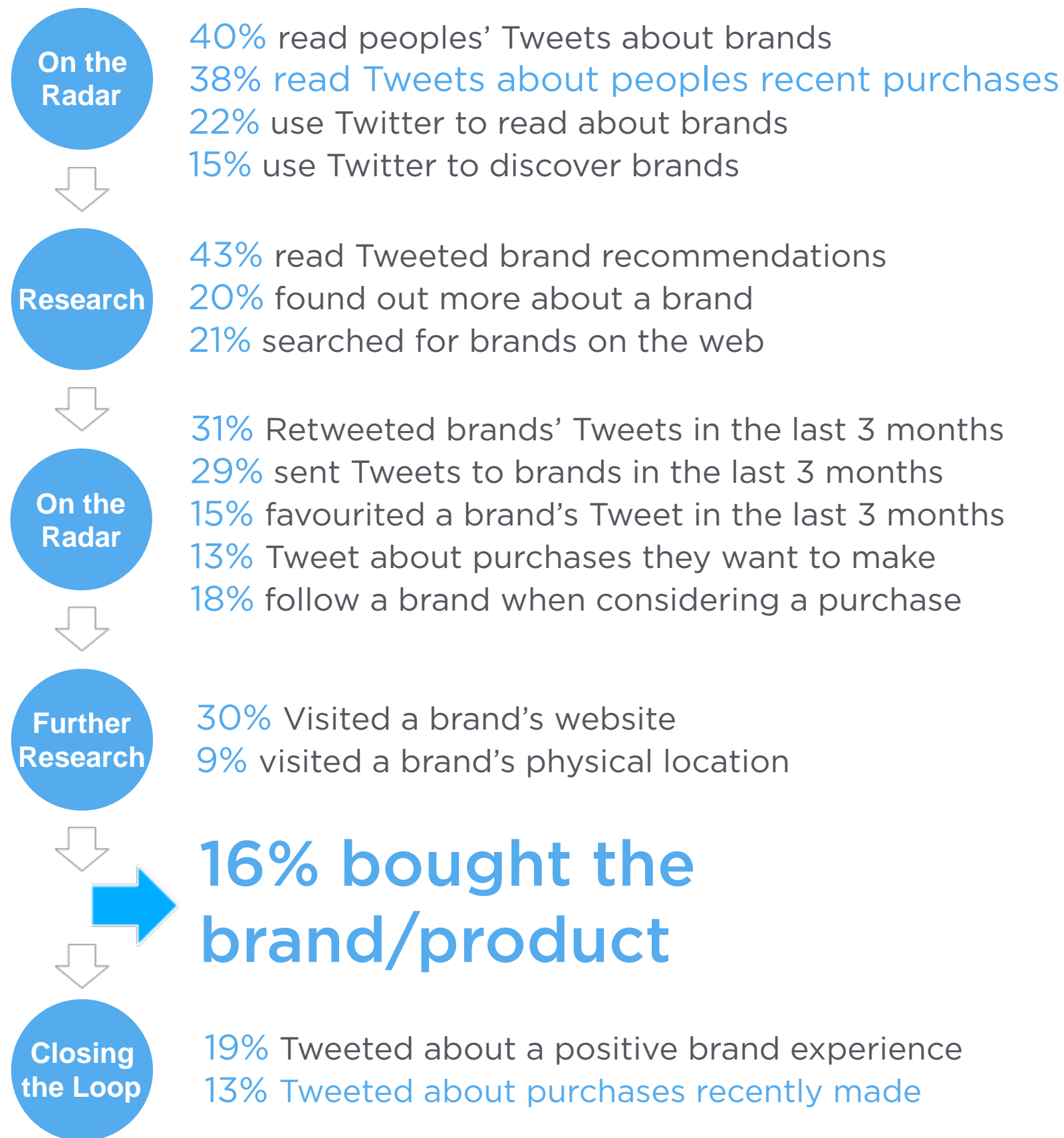
BRAND FOLLOWERS: WHY THEY FOLLOW BRANDS



CLOSING THE LOOP

67%

follow
brands/companies,
of whom...



A purchase
Tweeted
about is another
purchase
INSPIRED



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Base | Brand followers
Question | Q9, Q13, Q14, Q25, Q26, Q29 (Full question in notes)
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

VALUE OF A FOLLOWER

AS A RESULT OF FOLLOWING BRANDS/COMPANIES...



30%

visited a brand website



13%

looked at **reviews/recommendations**



21%

have **searched** for a brand online



20%

found out **more information** about a brand



16%

purchased brands/products



19%

have Tweeted about a positive experience



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Base | Brand followers

Question | Q29: As a result of following brands/companies on Twitter, have you done any of the following?

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

BRANDS ARE AMPLIFIED FOR THEIR LIKEABLE AND INTERESTING CONTENT

BRAND FOLLOWERS

BRAND **AMPLIFICATION**

1 in 3
have retweeted
brands in the
past 3 months...



Tweets
22%

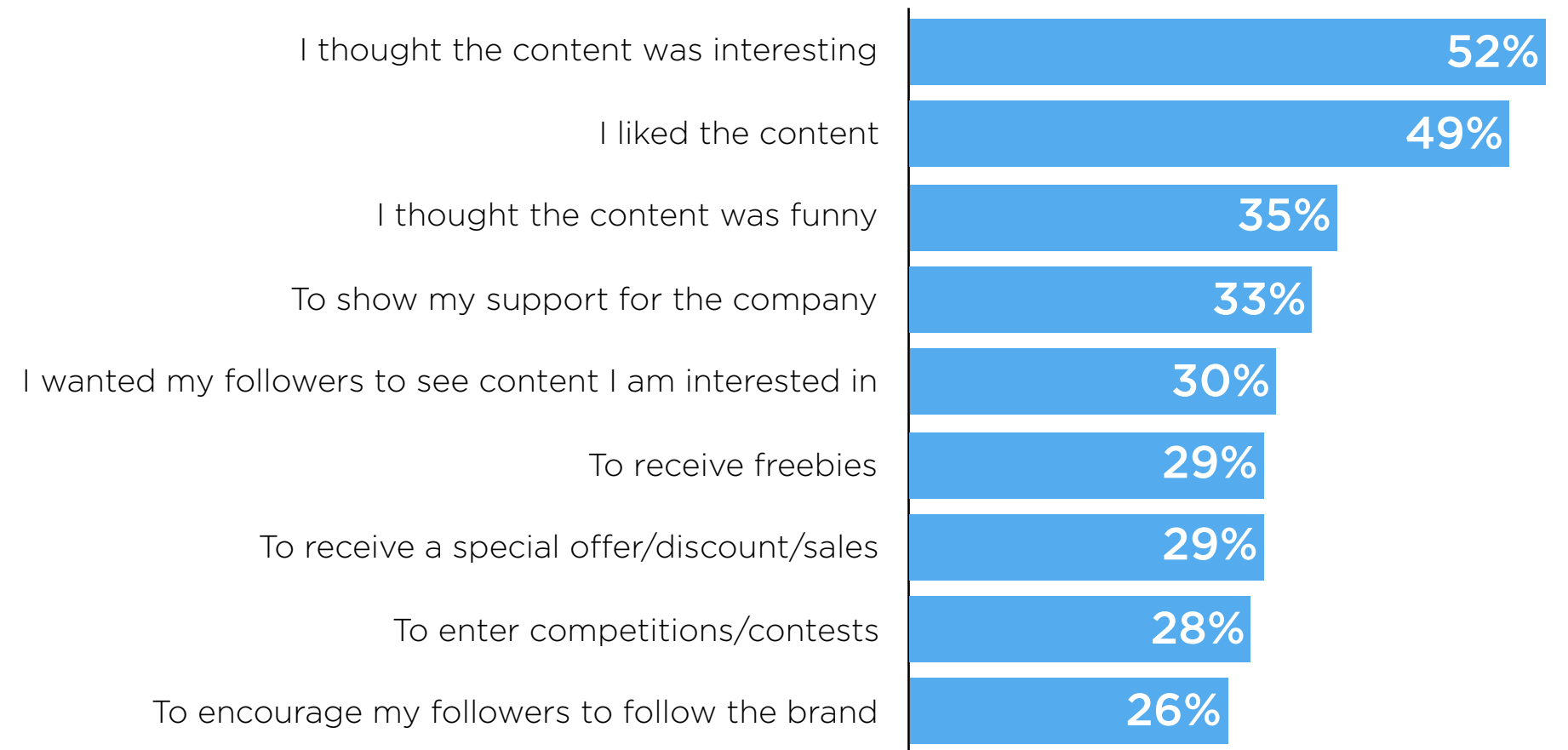


Photos
15%



Videos
11%

WHY THEY **RETWEET** BRANDS



Base | Brand followers

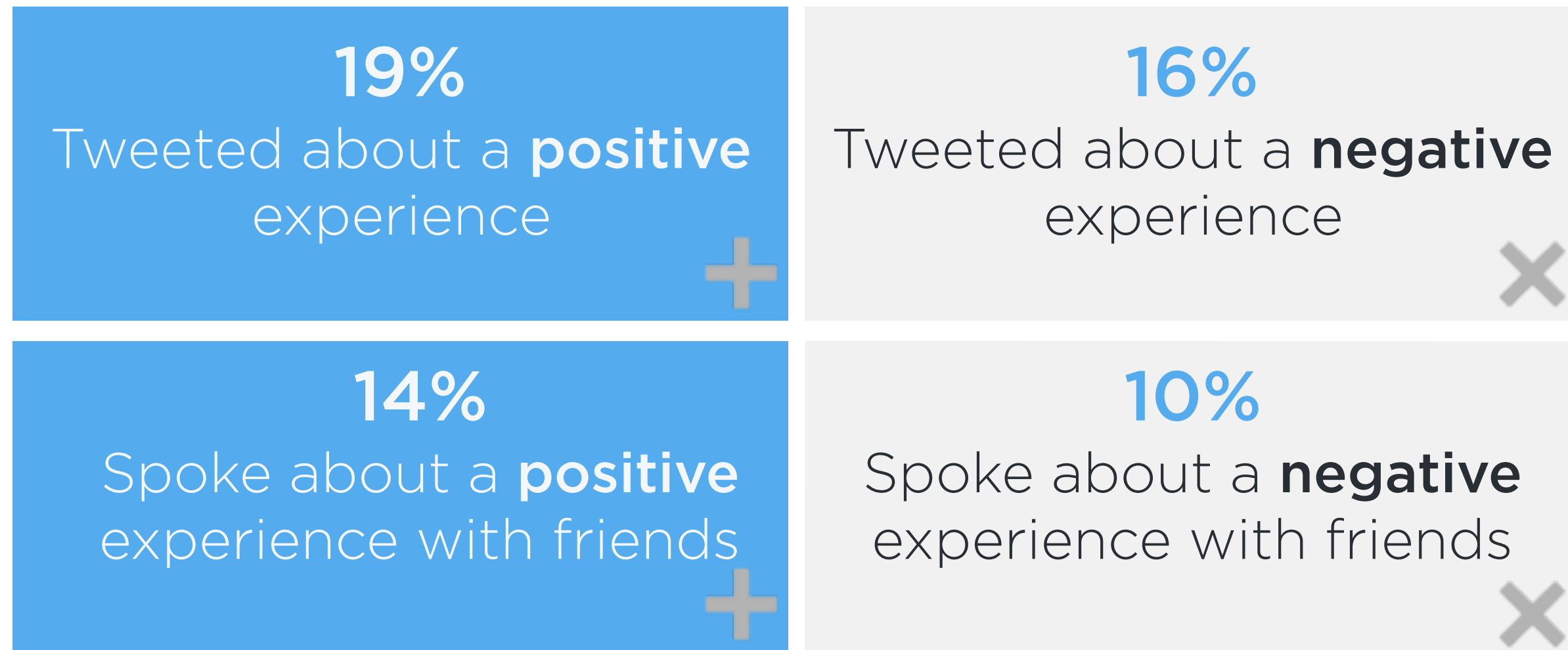
Question | Q26: Have you done any of the following in the last 3 months? Q27 You stated that you have retweeted content from brands/companies. Which of the following describes why you retweet them?

Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

FOLLOWERS COMMUNICATE POSITIVE BRAND EXPERIENCES

There is an opportunity on Twitter for brands to address negative comments

BRAND FOLLOWERS...



PROMOTED TWEETS POSITIVELY IMPACT KEY BRAND METRICS



35% of brand followers view ads on Twitter at least once a week



10% brand followers Retweet ads on Twitter

Nielsen Brand Effect for Twitter | Global Norms

Standard Norms Lift	Control v. Exposed	Control v. Engager
Tweet Recall	+89%	+338%
Message Association	+11%	+55%
Brand Awareness	+8%	+30%

Base | Brand followers
Question | Q8: Thinking about Twitter specifically, how frequently do you do the following? - View ads (Promoted Tweets, Promoted Accounts, Promoted Trends)
Q14; You mentioned earlier that you use the following features on Twitter. What content do you typically use each feature for? - Retweet Tweets
Note: Global Norms based on x number of studies: brand awareness: 116, message association: 156, Tweet recall:108
Lift means proportional uplift between control/exposed and control/engager
Source: Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands . Nielsen Brand Effect for Twitter

DUAL SCREENING

#DEEPPDIVE2015

SIMULTANEOUS ENGAGEMENT



Base: All Q10: On weekdays and weekends, when during the day do you use Twitter?
Base: Those that use Twitter whilst watching TV Q32: How often do you use Twitter on the following devices whilst watching TV? A: Very Often/Sometimes
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

FURTHERING BRAND INTERACTION WITH CONSUMERS

Brands have an opportunity to interact with consumers across multiple platforms in a synergistic manner



45%

Tweet about a TV advert during the TV show



79%

Use Twitter during TV advert breaks



53%

Searched on Twitter for a brand/product seen on a TV advert



81%

Focus on Twitter whilst TV is on in the background

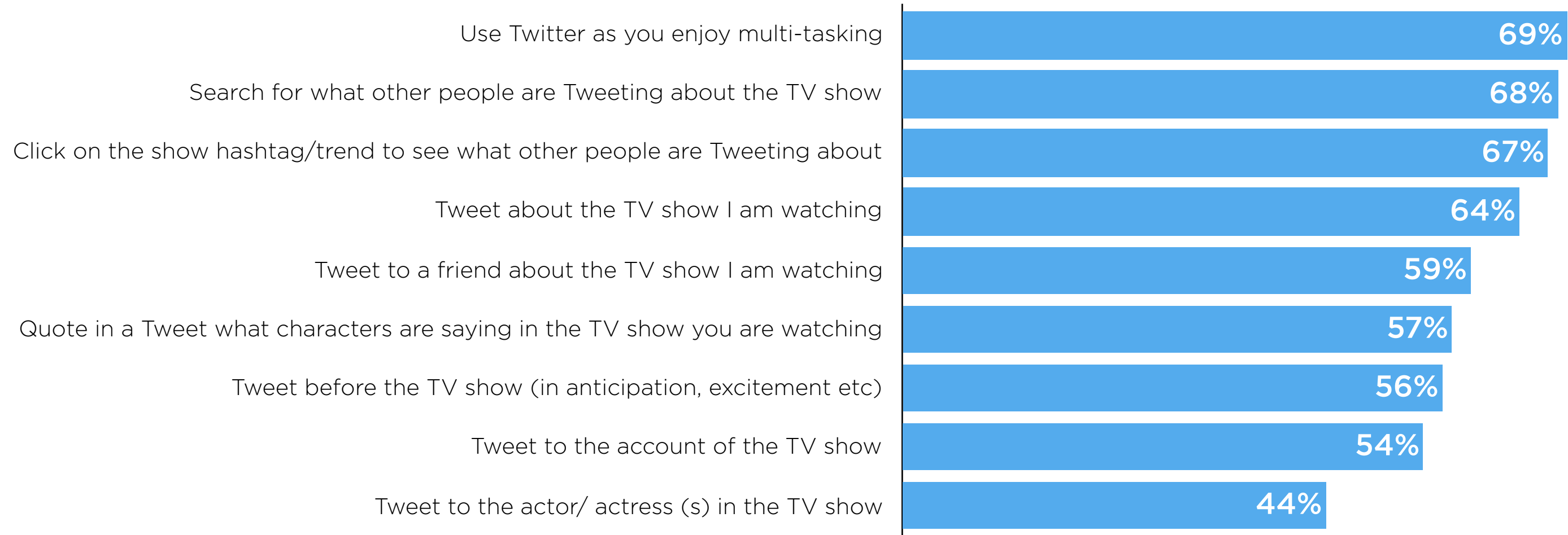


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Base: Those that use Twitter whilst watching TV (Very often/sometimes) Q33: You mentioned you used Twitter whilst watching TV. How frequently do you do the following on Twitter whilst watching TV? A: Very Often/Sometimes/Rarely
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

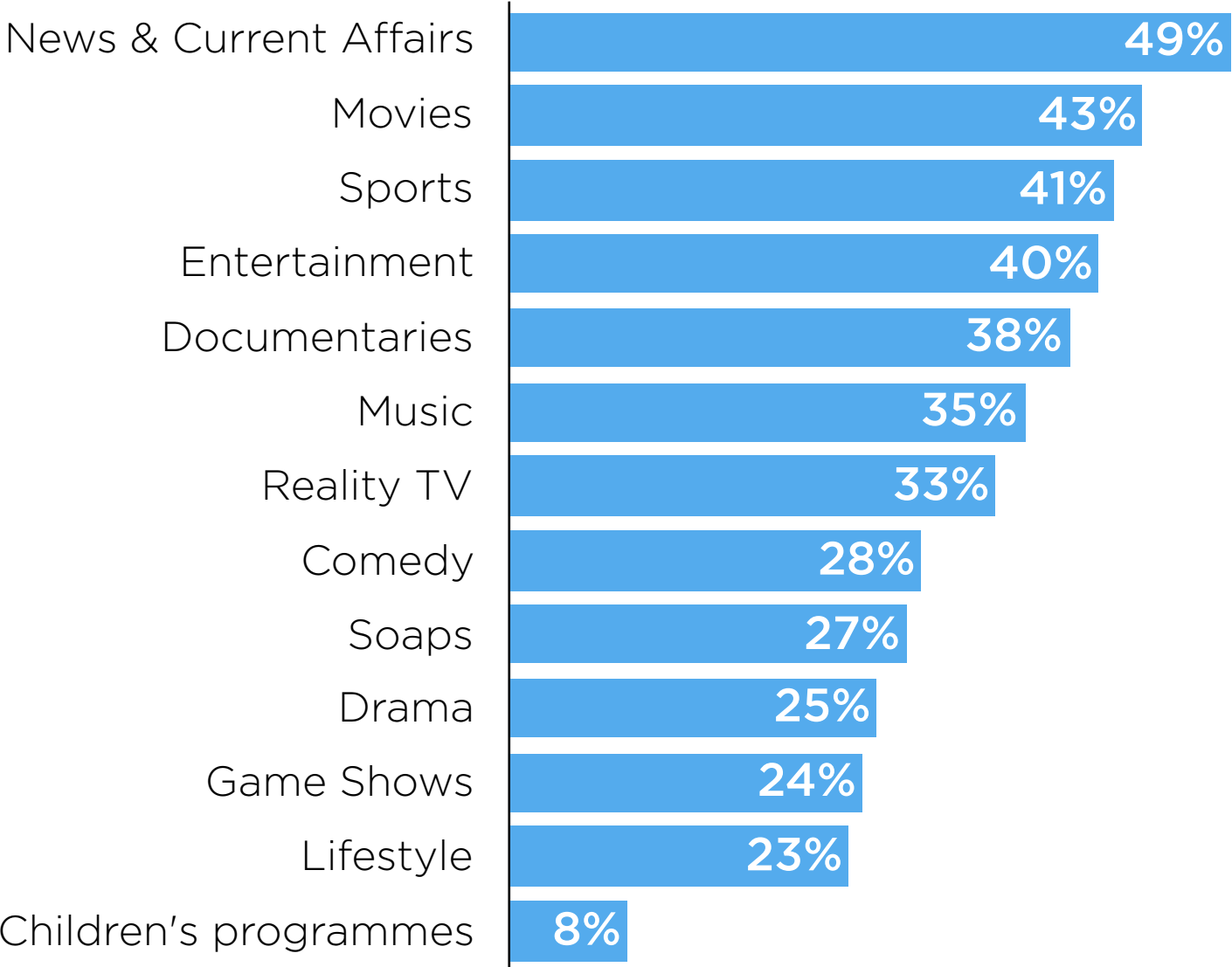
AMPLIFYING THE TV EXPERIENCE

over 2 in 3 Tweet about the TV show they are watching



Base: Those that use Twitter whilst watching TV (Very often/sometimes) Q33: You mentioned you used Twitter whilst watching TV. How frequently do you do the following on Twitter whilst watching TV? A: Very Often/Sometimes/Rarely
Source | Nielsen Twitter Consumer Deep Dive Survey, Aug-Sep 2015, Netherlands

DUAL-SCREENERS TWEET ABOUT AN ARRAY OF TV SHOW GENRES



THE TWITTER CONSUMER

#DEEPPDIVE2015

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