DUDE THAT MUST HAVE BEEN ONE RICH ONLINE BRAND EXPERIENCE.
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The era of the 30 second TV spot is over.

From now on I will only be producing 30 second YouTube spots.
How do consumers engage with brands in an increasingly digital world? That’s the fundamental question we set out to answer with this year’s FEED report.

**FEED: Past, Present, and Future**

This marks a significant shift in focus for our research. Our past studies have been almost exclusively concerned with charting how consumer behavior adapts to advances in Internet technology and web services. This still fascinates us, of course, but this year we are broadening our attention toward exploring how consumers interact with brands online. What does the future hold for brands when everything is just a click away? If consumers really are in control, what can we learn from their interaction with brands today?
Digital Brand Experiences Create Customers

The answer we found is that digital brand experiences are not just “awareness” or “conversion” plays, but *customer-creation plays*. According to our research, the overwhelming majority of consumers who actively engage with a brand digitally—whether by entering a contest, “friending” a brand on Facebook, or even watching an advert on YouTube—show dramatic upticks across the entire marketing funnel. Simply put, digital brand experiences create customers.

Goodbye Ad Wars, Hello Engagement Wars

Our findings lead us to believe that marketers need to dramatically rethink their future strategies, shifting the majority of their efforts toward actively engaging consumers—whether online or offline—and not simply settling for awareness or impressions. The advertising industry has had some legendary ad wars over the past decades: Coke versus Pepsi and Apple versus Microsoft,
for example. But the arena for those battles will change as the era of the 30-second spot makes way for the era of digital brand experiences. In today’s increasingly digital world, the experience is the message.

We believe that our findings provide a new perspective on how technology is fundamentally altering the evolving relationship between brands and consumers, mostly for the better. We hope you’ll agree.

Cheers,

Garrick Schmitt
Group Vice President, Experience Planning
Razorfish
I just got a tweet from Skippy Peanut Butter on aisle 6.
Yes, You Can Build a Brand Online. You Have No Choice.
Most marketers have never thought of digital as a wonderful place to build a brand. But that must change if their brands are to stay relevant in our digital era. Based on our 2009 Razorfish Digital Brand Experience Study, 65% of consumers report having had a digital experience that either positively or negatively changed their opinion about a brand. Of that group, a nearly unanimous 97% say that their digital experience influenced whether or not they eventually purchased a product or service from that brand. Digital is not only a place to build a brand: it can also make or break it.
**Actions Speak Louder Than Advertising**

Digital is an experiential medium. For brands to digitally engage consumers today, they must not only stand for something but also do something. Branded experiences (or actions) are the new advertising. And consumers are increasingly hungry for them, sometimes ravenously so. To simply extend brand messaging misses the point. According to our study, 97% of consumers report having searched for a brand online; 70% have read a corporate blog; 67% have watched a commercial or video advertisement on YouTube; and 65% have played a branded, browser-based game like Got Milk’s “Get The Glass.” And consumers want to interact, regardless of whether brands are willing participants: 73% have posted a product or brand review on a web site like Amazon, Yelp, Facebook, or Twitter.

**Brand Culture or Fan Culture?**

While conventional wisdom holds that consumers don’t want brands encroaching on their social or personal lives, this is far from the truth. In our 2008 study, we found that an overwhelming majority of consumers (76%) welcomed brand advertising on social networks. 2009 is the year of the “fan.” According to our study, nearly 40% of consumers reported having “friended” a brand on Facebook and/or MySpace and 26% have followed a brand on
Twitter. The myth of marketing-free social spaces is just that. The “dialogue” between brands and consumers is not only frequent, but also welcome.

**The Outlet Malls of Tomorrow?**
**Twitter, Facebook, and MySpace**

But what’s the substance of that dialogue between brands and consumers? Marketers are nothing if not passionate about their brands. Most assume that consumers are equally enthused. Twitter, Facebook, and MySpace seem like the ideal platforms to engage consumers around those “shared” passions. But, according to our study, consumers don’t want a conversation with brands—they want deals. Of those who follow a brand on Twitter, 44% say access to exclusive deals is the main reason. The same holds true for those who “friended” a brand on Facebook or MySpace, where 37% cite access to exclusive deals or offers as their main reason.
**Bottom Line: Digital Brand Experiences Create Customers**

There is no online equivalent of the Super Bowl for marketers—and with good reason. Digital is not simply an “awareness” play; it’s a customer-creation play. According to our study, the overwhelming majority of consumers who actively engage with a brand (e.g., follow a brand on Twitter or enter a contest) can evolve from passive reactors to advocates almost instantaneously. On average, 97% report increased brand awareness; 98% show increased consideration; 97% will likely purchase a product from the brand; and 96% may recommend the brand to their friends. Engagement equals affinity. Moreover, brands that use digital to drive awareness also drive sales: 64% of consumers report making a first purchase from a brand because of a digital experience.
THE REAL FACTS

BEHIND YOUR "OCCASIONAL COMMUNITY SITE VISITS."

- Facebook: Checks every 37 minutes
- Flickr: Posts 5 times a day
- YouTube: Watches 2.5 hours a day
- Twitter: Updates every 3 hours
- Yelp: Reviews 4 times a week
In August 2009, Razorfish surveyed 1,000 U.S. consumers (50.5% female, 49.5% male) in four major age groups to understand how their adoption of Internet technology and services impacted the way that they engaged with brands.

The respondents were evenly split geographically among the 10 major U.S. metros and broader geographic representation.
To avoid duplicating the more broad-based work of Pew, Forrester, and other research firms, our goal was to survey what we call “connected consumers.” These are the people whom our clients are most interested in both understanding and reaching.

Key characteristics include:

- Broadband access
- Spent $150 online in the past six months (travel, Netflix, tickets, Amazon, gifts, etc.)
- Visited a “community site” (MySpace, YouTube, Facebook, Yelp, etc.)
- Consumed or created some form of digital media, such as photos, videos, music, or news

Based on previous Razorfish consumer research, we have found that these “connected consumers” roughly mirror the U.S. population with broadband access. According to the Pew Internet & American Life Project, about 63% of all Americans today have a high-speed Internet connection, up from only 55% in 2008. This translates to roughly 200 million people, based on a July 2009 population estimate from the CIA World Factbook (total population 307,212,123, July 2009 estimate).
DID YOU
ORDER SOME STUFF
ONLINE?
I don't care if you do give me a bad review on Yelp. There is still a $250 fine for updating your Facebook status whilst driving.
DIGITAL PRIMACY

Over the past decade, we’ve watched firsthand as consumers have increasingly turned first and foremost to digital media. In a relatively short amount of time, U.S. consumers now spend, on average, about the same amount of time online as they do watching television.

Turning to Digital First, Foremost

According to Forrester’s 2009 North American Technographics Benchmark Survey, consumers spend 34% of their total media time online and 35% watching television. In fact, according to Forrester, if you are 45 years old or younger, you spend significantly more time using the Internet than watching television. We believe that this trend signifies the rise of “digital primacy,” where consumers are turning first and foremost to digital to help
them navigate, connect, and make sense of the world—and we are only beginning to understand the impact of this shift in consumer behavior.

Our findings in the 2009 Razorfish Digital Brand Experience Study not only underscore the shift to “digital primacy” but also point to a “connected consumer” who is far more digitally sophisticated and venturesome than commonly believed.

**Digital Fluency**

According to our study, 57% of consumers have actively customized their homepages with specific content feeds, scheduled updates, or used other features; 84% share links or bookmarks with a friend with some frequency; 55% subscribe to RSS feeds with some frequency; and an increasing number are getting
news from social media sites like Facebook and Twitter—more so than from popular blogs like the Huffington Post or Gawker.

Digital media consumption has also posted significant gains, portending a significant shift in the way that consumers engage with brands. According to our study, 84% of consumers rely on the web to get current news or information; 76% regularly watch online video on sites like YouTube and Hulu; 73% regularly visit social networking sites like Facebook, MySpace, and LinkedIn; and 62% listen to music online through services like iTunes and Pandora.

The rise of digital primacy is also changing the way consumers interact on-the-go and their expectations for mobile devices. Fifty-six percent
of “connected consumers” own a smartphone. BlackBerry and Apple, to no great surprise, are the most popular—and overwhelmingly so. But the real news is not about Apple or its ilk, but about how consumers will now demand mobile experiences that rival those built for a PC—with a twist, of course. We can get a sense of this by looking at the phenomenal rise of Apple’s iTunes App Store. As of October 2009, Apple reports iPhone and iPod touch owners have downloaded more than 2 billion “apps” from an inventory of over 85,000. This area holds great promise for marketers, as 24% of consumers in our study report have already downloaded a branded application for their mobile devices.

Given these statistics, plus the rapid rise of new technologies like location-based services and
augmented reality browsers, it makes more financial sense for brands to invest in the development of mobile applications—especially useful ones—than in display advertising if they want to take advantage of this emerging consumer trend.

**The New Mainstream**

Based on this data, we believe that “connected consumers”—mirroring other industry research studies and the general broadband population in the United States—are shooting the adoption curve when it comes to Internet technologies.

“Connected consumers” are actively engaged with digital media, both at home and on the go, and are personalizing their experiences whenever possible. This type of behavior may sound a lot like your own, actually. That’s not a surprise—but the speed and scale at which such digital fluency is occurring across the U.S. population *is*. Simply put, “connected consumers” are the new mainstream.
I can't decide whether to DRINK IT OR TURN IT INTO A GLOBAL VIRAL PHENOMENON.
Is today’s consumer really in control? As far as conventional advertising industry wisdom is concerned, every generation of consumer grows smarter, shrewder, and more immune to marketing. Today it’s fashionable to proclaim that advertising and marketing no longer work; that trust in brands is eroding as consumers turn to their peers for everything from purchasing recommendations to the latest news.
All of this would be fine and good, if it were true. But according to our findings, consumers are actually more receptive and actively engaged with brands than ever before. According to our study, nearly 40% of consumers report having “friended” a brand on Facebook and/or MySpace and 26% have followed a brand on Twitter. Advertising isn’t failing—it’s adapting.

Beyond just social media, consumers are deeply engaged with brands across the entire digital channel—and it’s by choice. According to our study, 77% have watched a commercial or video advertisement on YouTube with some frequency; 69% have read a corporate blog post with some frequency; 73% have posted a product or brand review on a web site like Amazon, Yelp, Facebook, or Twitter; and 52% have blogged about a brand’s product or service.
HAVE YOU EVER “FRIENDED” A BRAND ON FACEBOOK OR MYSPACE?

40.1%  YES  59.9%  NO

Consumers clearly don’t believe that digital is a one-way medium, either. A surprising 69% of them have provided feedback to a brand, either through its web site or a third-party service like GetSatisfaction.com.

Clearly these interactions are more than casual encounters with a brand—they’re uniquely digital. It’s not like you can “friend” a billboard or have a conversation with a television spot, after all. No, our findings point to digital enabling the behavior of a deeply engaged consumer whose actions more closely resemble those of a “fan.”

The Language of Love for Brands? Deals.

Clearly consumers are doing more with brands today than simply “receiving messages.” Many social pundits would say that this is a new form of “dialogue” with brands. But if that’s so, the subject of that “dialogue” surprises. Based on our research,
it’s not so much about some type of “shared passion” for a brand’s values. Largely, it’s about deals—pure and simple.

Of those who follow a brand on Twitter, 44% say access to exclusive deals is the main reason. This is also true for those who “friended” a brand on Facebook or MySpace, where 37% cite access to exclusive deals or offers as their main reason.

In hindsight, this makes perfect sense. Dell has earned kudos from social media mavens for generating $3 million in sales from its Dell Outlet through Twitter. Starbucks has soared to the top of Facebook brand pages, with nearly 4 million friends, by offering fans coupons for free pastries and ice cream. And Whole Foods tops Twitter with 1.5 million followers by broadcasting weekly specials and shopping tips.
Fan Culture

Not surprisingly, the other significant driver of brand engagement in social media is customer service. Thirty-three percent of consumers who “friend” a brand on Facebook or MySpace report doing so because they are a current customer, as do 24% on Twitter. These consumers, already customers, clearly are fans—there’s little reason to “friend” a brand you’re indifferent about, after all. For example, Comcast, Zappos, and Virgin have all earned high marks by using Twitter as a customer relationship management (CRM) tool, solving customer problems in real time and building loyalty through special offers.

WHAT IS THE PRIMARY REASON YOU “FRIEND” A BRAND ON FACEBOOK OR MYSPACE?

- I am a current customer: 32.9%
- Exclusive deals or offers: 36.9%
- Other people I know are fans of the brand: 6.2%
- Interesting or entertaining content: 18.2%
- Service, support, or product news: 5.0%
- Other: 0.7%
The Promise of Twitter

Interestingly enough, Twitter may turn out to be a game-changer in the ongoing relationship between brands and consumers. According to our findings, those who follow a brand on Twitter seem to be engaged beyond deals or customer service: 23% cite “interesting or entertaining” content as their main reason. Perhaps this points to the emerging trend of brands needing to become content providers to better connect with consumers. Given a recent report from Penn State’s College of Information Sciences and Technology (IST) published in the *Journal of the American Society for Information Science and Technology*, which found that 20% of all “tweets” mention specific brands or products, Twitter may play a larger (and more intriguing) role in moving the brand marketing mix forward.

Fans and the Future of the Funnel

Facebook and Twitter may be the darlings of the social web today, but fan culture spreads far beyond these platforms and well beyond social media in general. Consumers are engaged broadly with brands, both online and offline; those interactions are having a profound effect on the traditional purchase funnel. Beyond social activity, 70% have participated in a brand-sponsored contest or sweepstakes; 24% have produced content (photo,
video, story, etc.) in order to participate in a contest held by a brand; 26% of consumers have attended a brand-sponsored event such as Nike’s Human Race or Red Bull’s Flugtag; and 24% have downloaded a branded application for their mobile phone.

Those numbers in and of themselves are surprising. But the figures have even more impact when you correlate consumer brand engagement with activity across the marketing funnel.

Adding it all up, it quickly becomes obvious that consumer brand engagement creates customers. On average, 97% report increased brand awareness; 98% show increased consideration; 97% will likely purchase a product from the brand; and 96% may recommend the brand to their friends.
For example, of the 70% of consumers who have participated in a brand-sponsored contest or sweepstakes, a staggering 96% are more aware of the brand; 96% are more likely to consider that brand when in the market for a product or service; 96% are more likely to purchase a product or service from that brand; and 92% are more likely to recommend that brand to others.

**Experiences Build Brands**

The best companies of our generation understand how engagement and positive experiences create customers. Google and Facebook are experiential brands, as are Zappos, Twitter, Netflix, Amazon, Apple, Starbucks, and Nike. These companies understand that we are living in a world where consumer preference isn’t formed in reaction
to a message, but through a series of experiences over time. Ultimately, it’s a dialogue of interactions that’s stunningly effective when done right.

As Jeff Bezos, Amazon’s CEO, has been known to say: “Your brand is formed primarily, not by what your company says about itself, but what the company does.” Experience, as we will see, not only matters—it drives results to the bottom line.
I know you prefer whole grain granola honey.

But Count Chocula gives us all a much richer digital experience.
Digital brand experiences create customers. As we’ve found in our study, the overwhelming majority of consumers who actively engage with a brand digitally—whether by creating content for a contest or by “friending” a brand on Facebook—show a propensity to both purchase products and recommend those products or that brand to others.

But what does brand engagement mean for the future of marketing and sales?

Quite a lot, actually, particularly given the projected growth rate of interactive advertising in the coming years. GroupM predicts that, in 2010, digital will represent 17% of the U.S. advertising marketplace, making it the third largest medium in the United
States, behind television and magazines.* The outlook is even rosier over the next five years, according to Forrester’s April 2009 Interactive Advertising Models, which predict digital to hit $55 billion by 2014.

Of that increasingly large digital pie, much will be allocated toward “measured” categories like search, display, email, and social media marketing. But “unmeasured” spending on “brand engagement” should soar, given the outsized influence it will have over customer creation in the coming years.

**Measuring Brand Engagement**

No wonder, then, that so many are trying to gauge the financial impact of brand engagement. Millward Brown, in its annual BrandZ Digital Consumer Report, found that “digital consumers” have a 15% stronger relationship with a typical brand across all categories and countries. The Altimeter Group, led by former Forrester analysts Charlene Li and Jeremiah Owyang, produced a study called the ENGAGEMENTdb 2009 Report that attempted to correlate brand engagement via social media activity to a company’s financial performance. The group cited Starbucks, Dell, and eBay as the most engaged brands based on the breadth of

HAS AN EXPERIENCE YOU HAVE HAD ONLINE EVER CHANGED YOUR OPINION (EITHER POSITIVELY OR NEGATIVELY) ABOUT A BRAND OR THE PRODUCTS AND SERVICES IT OFFERS?

65.3% YES 34.7% NO

social tools that those brands use to engage users, as well as the depth of their interactions (e.g., responding to blog comments).

In our Razorfish Digital Brand Experience Study, we took a different tack. Simply, we wanted to know if there were any direct correlation between consumers’ online interaction with a brand and their likelihood to purchase a given product or service.

The answer was a resounding “yes.” According to our findings, 65% of consumers report that a digital brand experience has changed their opinion (either positively or negatively) about a brand or the products and services a brand offers.

That’s a significant figure that bears pondering for a moment: A clear majority of consumers’ affinity for a brand is swayed, either positively or negatively, by their digital experience with that
brand. We’ve always believed, largely through anecdotal research, that consumers make purchasing decisions—in part—because of the quality of a brand’s website. This is obvious in industries like banking, e-commerce, and search, where the quality of service and the ability to complete transactions are paramount. But this is less obvious in other industries, such as consumer packaged goods and fast food. However, it’s now clear that consumers are expecting equivalent superior experiences from all of their digital interactions with brands.

Digital Drives Sales

Furthermore, these digital brand experiences directly correlate to purchasing behavior for these consumers. According to our study, 97%—a near-unanimous majority—report that a digital brand experience has influenced whether or not
they then went on to purchase a product or service from a brand. Digital experiences not only build a brand, they can also make or break it. For those brand marketers still neglecting (or underestimating) digital, it’s as if they’ve shown up to a cocktail party in sweatpants. Invariably, consumers will choose to converse with a savvier—and hopefully more stylish—partner.

Based on these findings, we believe that marketers will have to think much more broadly about how they are connecting with consumers across the digital channel. From search, to web site, to display ad, to microsite, to mobile application, to Facebook page, every interaction has the power to shift a consumer’s affinity for a brand. Certain brands already live this. For example, CNN has crafted an
integrated approach to connecting with consumers, whether they watch its cable programming, receive headline updates via Twitter, or watch video segments on their iPhones.

As “digital primacy” has risen, so has the way consumers learn about and purchase a brand’s products and services. Because of the interactive nature of the medium, one brand experience can lead a consumer from “awareness” through “purchase” and “recommendation” almost instantly. According to our study, 64% of consumers have made a first purchase from a brand because of a digital experience such as a web site, microsite, mobile coupon, or email. No other medium has so impacted—or altered—the traditional marketing funnel this way.

Perhaps one day, when interactive TV becomes a reality, consumers may make a purchase via remote control after watching a 30-second spot from a comfy seat on the couch. But it’s doubtful that in this scenario consumers would also instantly tweet about it, review it on Yelp, or share it with a friend on Facebook. Only digital seems to have such immediate and expansive impact.
The Net Effect

It never hurts to make a good impression, but for brands to remain relevant in this new digital era, it’s much better to find a way to engage consumers than to talk at them. Based on our findings, we are even more convinced that digital brand experiences matter. Engagement creates customers—not just through social media, but across the entire digital channel. And, more importantly, it drives returns to the bottom line. As a result, marketers will need to rethink not only how they reach potential consumers but also what type of experiences they are creating to engage them. Now “clicks” and “impressions” mean far less than conversations and brand behaviors. In our opinion, it’s about time.
In the spirit of Stewart Brand, who famously proclaimed that “information wants to be free,” we are including the full data set from our 2009 Razorfish Digital Brand Experience Study for your review. The interviews were conducted in August 2009 using an online automated survey tool and were given to a panel of consumers whom we screened for certain behaviors and attributes (see The Details). Brand, we should add, also said—less famously—that “information wants to be expensive.” Given that, please use freely but attribute appropriately. We hope you find it useful.
Question 1: **What is your age?**

- 18-24 years old: 11.70%
- 25-36 years old: 33.70%
- 37-44 years old: 26.40%
- 45-55 years old: 28.20%
- 17 or below: 0%
- 56 or older: 0%

Question 2: **Are you male or female?**

- Female: 50.5%
- Male: 49.5%
Question 3: **Which of the following best describes your combined household income?**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $60,000 a year</td>
<td>454</td>
<td>45.40%</td>
</tr>
<tr>
<td>$61,000 - $99,000 a year</td>
<td>339</td>
<td>33.90%</td>
</tr>
<tr>
<td>$100,000 - $149,000 a year</td>
<td>133</td>
<td>13.30%</td>
</tr>
<tr>
<td>$150,000 - $200,000 a year</td>
<td>56</td>
<td>5.60%</td>
</tr>
<tr>
<td>More than $200,000 a year</td>
<td>18</td>
<td>1.80%</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>1,000</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Question 4: **Where do you live?**

<table>
<thead>
<tr>
<th>Choice</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco Bay Area</td>
<td>50</td>
<td>5.00%</td>
</tr>
<tr>
<td>Seattle</td>
<td>43</td>
<td>4.30%</td>
</tr>
<tr>
<td>Dallas</td>
<td>50</td>
<td>5.00%</td>
</tr>
<tr>
<td>Atlanta</td>
<td>50</td>
<td>5.00%</td>
</tr>
<tr>
<td>New York City</td>
<td>48</td>
<td>4.80%</td>
</tr>
<tr>
<td>Chicago</td>
<td>51</td>
<td>5.10%</td>
</tr>
<tr>
<td>Miami</td>
<td>42</td>
<td>4.20%</td>
</tr>
<tr>
<td>Boston</td>
<td>50</td>
<td>5.00%</td>
</tr>
<tr>
<td>Washington, D.C.</td>
<td>50</td>
<td>5.00%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>50</td>
<td>5.00%</td>
</tr>
<tr>
<td>Other</td>
<td>516</td>
<td>51.60%</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>1,000</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
Question 5: Which of the following best describes your Internet connection at home?

- Broadband 100.0%
- Dial-Up 0.0%

Question 6: Which of the following best describes your online shopping behavior?

- I have spent less than $150.00 online in the last 6 months on products (books, CDs, etc.) and services (travel, Netflix, etc.) 0.00%
- I have spent more than $150.00 online in the last 6 months on products (books, CDs, etc.) and services (travel, Netflix, etc.) 100.00%
Question 7: **Which of the following describes your online entertainment behavior?**

- I regularly listen to music online: 62.50%
- I regularly watch video online: 76.10%
- I regularly use photo-sharing sites: 38.10%
- I rely on the Web to get current news or information more than I do the television: 84.30%
- I regularly visit social networking sites: 73.60%
- None of the above: 0.00%

Question 8: **Which browser do you use?**

- Internet Explorer: 62.30%
- Firefox: 30.20%
- Safari: 3.10%
- Chrome: 2.70%
- Opera: 0.60%
- Other: 1.10%
Question 9: **Which of the following is the homepage in your browser?**

- Google: 32.60%
- Yahoo!: 29.70%
- AOL: 7.90%
- MSN: 11.90%
- Ask.com: 0.20%
- Other: 17.70%

Question 10: **Have you customized your homepage with specific content feeds, scheduled updates, or other features?**

- Yes: 57.40%
- No: 42.60%
Question 11: Please rate the frequency of which you do the following:

- Share links or bookmarks with a friend
  - Never: 15.70%
  - Sometimes: 13.90%
  - Usually: 49.50%
  - Always: 44.90%

- Subscribe to RSS feeds
  - Never: 12.60%
  - Sometimes: 12.60%
  - Usually: 40.90%
  - Always: 49.90%

- Read “most popular” or “most emailed” links on web sites
  - Never: 17.50%
  - Sometimes: 13.40%
  - Usually: 28.20%
  - Always: 34.90%

- Use tag clouds
  - Never: 22.80%
  - Sometimes: 17.00%
  - Usually: 22.80%
  - Always: 49.80%

- Play games in your browser
  - Never: 17.20%
  - Sometimes: 21.60%
  - Usually: 22.30%
  - Always: 38.90%

- Download an app for your phone
  - Never: 27.90%
  - Sometimes: 13.60%
  - Usually: 27.90%
  - Always: 49.60%

- Access an Internet service from your phone
  - Never: 24.10%
  - Sometimes: 15.50%
  - Usually: 17.90%
  - Always: 42.50%

- Try an augmented reality experience
  - Never: 7.50%
  - Sometimes: 17.10%
  - Usually: 7.50%
  - Always: 3.70%
Question 12: **Do you own a smartphone (i.e., one that has email and web capabilities)?**

- Yes: 56.30%
- No: 43.70%

Question 13: **What type of smartphone do you have?**

- Apple: 20.07%
- BlackBerry: 29.48%
- LG: 13.50%
- Samsung: 13.85%
- Motorola: 8.17%
- Windows Mobile: 1.42%
- Google: 1.07%
- Palm: 3.02%
- Nokia: 3.91%
- Other: 5.51%
Question 14: **Where do you get your news online? Mark all that apply.**

- 79.90% Traditional news web sites
- 27.30% Alternative news web sites
- 33.30% Facebook
- 19.50% Twitter
- 11.20% Podcast
- 30.80% Other
- 3.00% I don't read news online

Question 15: **When visiting a microsite, which is typically a smaller site or a separate page built off of a company’s general web site, do you typically visit those that are:**

- 9.30% Product microsites (e.g., iPhone microsite)
- 9.30% Company microsites (e.g., Apple)
- 46.40% Both equally
- 35.00% I am not sure
Question 16: Please rate the frequency of which you do the following:

- Watch commercials or video advertisements on YouTube
  - Never: 23.20%
  - Sometimes: 30.90%
  - Usually: 15.70%
  - Always: 10.40%
- Read blogs produced by products or brands (e.g., Nintendo)
  - Never: 30.00%
  - Sometimes: 18.20%
  - Usually: 3.00%
  - Always: 8.70%
- Search for a brand online (e.g., Nike)
  - Never: 30.00%
  - Sometimes: 26.40%
  - Usually: 3.00%
  - Always: 40.60%
- Play browser-based games produced by a brand (e.g., Got Milk?)
  - Never: 15.80%
  - Sometimes: 39.30%
  - Usually: 15.80%
  - Always: 9.50%
- Post product or brand reviews on web sites (e.g., Amazon, Yelp, Facebook, Twitter, etc.)
  - Never: 22.50%
  - Sometimes: 38.00%
  - Usually: 26.80%
  - Always: 12.70%
- Provide feedback to a brand, either through its web site or a third-party service (e.g., Get Satisfaction)
  - Never: 31.00%
  - Sometimes: 41.30%
  - Usually: 18.40%
  - Always: 9.30%
- Interact with a banner ad on your mobile phone
  - Never: 47.50%
  - Sometimes: 31.30%
  - Usually: 13.00%
  - Always: 8.20%
- Blog about a brand, product, or service
  - Never: 69.30%
  - Sometimes: 17.30%
  - Usually: 4.90%
  - Always: 8.50%
Question 17: **Has an experience you have had online ever changed your opinion (either positively or negatively) about a brand or the products and services it offers?**

- Yes: 65.30%
- No: 34.70%

Question 18: **Has that experience influenced whether or not you purchased a product or service from the brand?**

- Yes: 97.09%
- No: 2.91%
Question 19: **Have you ever attended a brand-sponsored event? As an example, Nike’s Human Race, Red Bull’s Flugtag, or a Burt’s Bees Mobile Tour.**

- Yes: 26.10%
- No: 73.90%

Question 20: **When you have attended a brand-sponsored event, does it generally do the following?**

- **Raise your awareness of the brand**
  - Never: 9.50%
  - Sometimes: 15.80%
  - Usually: 26.40%
  - Always: 35.40%

- **Consider the brand when you are in the market for that product or service**
  - Never: 3.00%
  - Sometimes: 30.00%
  - Usually: 30.00%
  - Always: 42.20%

- **Purchase a product or service from that brand**
  - Never: 8.70%
  - Sometimes: 18.20%
  - Usually: 28.40%
  - Always: 40.60%

- **Recommend the brand to others**
  - Never: 15.70%
  - Sometimes: 23.20%
  - Usually: 39.30%
  - Always: 50.70%
Question 21: **Have you ever participated in a brand-sponsored contest or sweepstakes?**

![Pie chart showing the results of the question, with 70.00% indicating participation and 30.00% indicating non-participation.]

Question 22: **When you have participated in a brand-sponsored contest or sweepstakes, does it generally do the following?**

- **Raise your awareness of the brand**
  - Never: 41.0%
  - Sometimes: 36.4%
  - Usually: 42.1%
  - Always: 36.4%

- **Consider the brand when you are in the market for that product or service**
  - Never: 4.3%
  - Sometimes: 13.7%
  - Usually: 42.3%
  - Always: 36.4%

- **Purchase a product or service from that brand**
  - Never: 3.9%
  - Sometimes: 10.7%
  - Usually: 51.6%
  - Always: 33.9%

- **Recommend the brand to others**
  - Never: 6.3%
  - Sometimes: 29.6%
  - Usually: 50.1%
  - Always: 14.0%
Question 23: Have you ever produced content (photo, video, story, etc.) in order to participate in a contest held by a brand?

- Yes: 24.00%
- No: 76.00%

Question 24: When you have produced content in order to participate in a contest, does it generally do the following?

- Raise your awareness of the brand:
  - Never: 2.08%
  - Sometimes: 30.83%
  - Usually: 41.67%
  - Always: 41.67%
- Consider the brand when you are in the market for that product or service:
  - Never: 2.08%
  - Sometimes: 27.08%
  - Usually: 51.67%
  - Always: 19.17%
- Purchase a product or service from that brand:
  - Never: 1.67%
  - Sometimes: 36.67%
  - Usually: 44.17%
  - Always: 17.50%
- Recommend the brand to others:
  - Never: 2.92%
  - Sometimes: 33.75%
  - Usually: 37.92%
  - Always: 25.42%
Question 25: **Have you ever followed a brand on Twitter?**

- Yes: 25.50%
- No: 74.50%

Question 26: **When you follow a brand on Twitter, does it generally do the following?**

- Raise your awareness of the brand: 3.14% Never, 25.49% Sometimes, 42.35% Usually, 29.02% Always
- Consider the brand when you are in the market for that product or service: 1.96% Never, 19.81% Sometimes, 31.37% Usually, 47.45% Always
- Purchase a product or service from that brand: 3.14% Never, 23.92% Sometimes, 30.98% Usually, 45.88% Always
- Recommend the brand to others: 2.75% Never, 19.61% Sometimes, 36.86% Usually, 30.41% Always
Question 27: **What is the primary reason you follow a brand on Twitter?**

- I am a current customer: 23.5%
- Exclusive deals or offers: 43.5%
- Other people I know are fans of the brand: 6.3%
- Interesting or entertaining content: 22.7%
- Service, support, or product news: 3.5%
- Other: 0.4%

Question 28: **Have you ever “friended” a brand on Facebook or MySpace?**

- Yes: 40.10%
- No: 59.90%
Question 29: **When you “friend” a brand on Facebook or MySpace, does it generally do the following?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Never</th>
<th>Sometimes</th>
<th>Usually</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raise your awareness of the brand</td>
<td>3.24%</td>
<td>21.45%</td>
<td>38.65%</td>
<td>36.66%</td>
</tr>
<tr>
<td>Consider the brand when you are in the market for that product or service</td>
<td>2.00%</td>
<td>34.41%</td>
<td>40.90%</td>
<td>22.69%</td>
</tr>
<tr>
<td>Purchase a product or service from that brand</td>
<td>2.99%</td>
<td>17.46%</td>
<td>42.89%</td>
<td>33.92%</td>
</tr>
<tr>
<td>Recommend the brand to others</td>
<td>3.99%</td>
<td>22.94%</td>
<td>39.15%</td>
<td>33.92%</td>
</tr>
</tbody>
</table>

Question 30: **What is the primary reason you “friend” a brand?**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am a current customer</td>
<td>32.9%</td>
</tr>
<tr>
<td>Exclusive deals or offers</td>
<td>36.9%</td>
</tr>
<tr>
<td>Other people I know are fans of the brand</td>
<td>6.2%</td>
</tr>
<tr>
<td>Interesting or entertaining content</td>
<td>18.2%</td>
</tr>
<tr>
<td>Service, support, or product news</td>
<td>5.0%</td>
</tr>
<tr>
<td>Other</td>
<td>0.7%</td>
</tr>
</tbody>
</table>
Question 31: **Have you ever downloaded a branded application for your mobile device?**

- Yes: 23.60%
- No: 76.40%

Question 32: **Have you ever made your first purchase from a brand because of a digital experience (e.g., a web site, microsite, mobile coupon, email)?**

- Yes: 64.10%
- No: 35.90%
Question 33: What, exactly, do you make of all this?

(a) It was surprising, enlightening, and invaluable.

(b) Interesting, but I liked the pictures and pie charts best.

(c) Dude, I like totally knew all this before I even read it.

(d) I'll tell you exactly what I think:
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Razorfish is one of the largest interactive marketing and technology companies in the world. With a demonstrated commitment to innovation, Razorfish counsels its clients on how to leverage digital channels such as the web, mobile devices, in-store technologies, and other emerging media to engage people, build brand loyalty, and provide excellent customer service. The company is increasingly advising marketers on Social Influence Marketing, its approach for employing social media and social influencers to achieve the marketing and business needs of an organization. Its award-winning client teams provide solutions through their strategic counsel, digital advertising and content creation, media buying, analytics, technology, and user experience. Razorfish has offices in markets across the United States and in Australia, China, France, Germany, Japan, Spain, and the United Kingdom. Clients include Carnival Cruise Lines, MillerCoors, Levi Strauss & Co., McDonald’s, and Starwood Hotels. Visit [www.razorfish.com](http://www.razorfish.com) for more information or follow us on Twitter [@razorfish](http://twitter.com/razorfish).

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