

# Using surveys to predict the future of social media

The fast-moving world of social media can seem daunting to keep up with, let alone predict. How well are experts in the field doing at staying abreast?

**Grunwald Associates LLC has been tracking kids' media and technology use since 1995 through industry-wide studies underwritten by companies such as MySpace, Microsoft, Verizon and AT&T. In 2007, Grunwald Associates LLC conducted an extensive study of social media, including surveys of children, parents, and educators. We made a number of recommendations and predictions along the way, which we can now revisit.**

By 2007, we found that kids, and especially teens, were spending at least as much time using new media as traditional media, and to the extent they were using them simultaneously, interactive media was starting to dominate mindshare. So we urged kids' providers to shift their media mix online at the expense of television and print. To a great extent this has happened, though we feel the current balance still doesn't fully reflect kids' behavior today.

At the time, social media wasn't particularly social—it still consisted mainly of large collections of individual profile pages waiting to be viewed. We predicted a revolution in friend-to-friend communication, with providers developing new reasons and increasingly sophisticated ways for friends to connect on an ongoing basis, as well as providing them with more things to do together on social sites. Thanks to Facebook, Apple and others, a myriad of

applications built to be shared (or simply to encourage communication) have spread, in many cases to millions of users each. The most sophisticated and increasingly effective of these have been community-based or team games like Farmville (56 million users) and Mafia Wars (26 million). Meanwhile top advertisers have allowed users to do everything from “elfing” themselves (Home Depot) to suing their friends (Coke).

Similarly, for some years, we've been tracking “active multitasking” (where what's going on in one medium directly impacts a child's activity in another medium they're using at the same time). In our study, we found that all kinds of active multitasking had increased dramatically, particularly social activities like sending emailing, IMing, or texting a friend while watching the same TV show. This led us to project and encourage more integrated ‘surround sound’ experiences where television, radio, and online offerings would be designed to work together in real time. Since then, there's no question that Internet features, especially polling, have been integrated more broadly into television programming, though in general these integrated environments have not reached the levels of integration and sophistication we were expecting by now.

Likewise, while point/reward programs that motivate kids' intense, ongoing social participation may finally be widespread enough to erase the "desire deficit" we first found in 2003 (the disconnect between the percent of children who wanted such loyalty programs and those who said sites they visited were providing them), we still see many obvious ways for companies to make these kinds of programs more effective that few are leveraging today.

At the same time, there have been some changes we expected, and still expect, that could have much wider implications. For example, based on the negative reaction many parents and children have had to advertising on profile pages, we expect social media sites to eventually treat their users more as partners, with a voice in the kinds of advertising that gets displayed on their pages -- and perhaps even sharing a piece of site advertising revenues. Based on the occasionally uneasy relationship between major social media sites and their users, we expect more such movement going forward. The good news: large numbers of kids and teens say there are many types of advertisers they'd be happy to see in social media sites.

Another big opportunity many providers are missing is to support children more in their online goals. Many kids are building the Internet in their own image, engaging in a wide variety of authoring activities. But few providers have stepped up to this opportunity by sponsoring, for example:

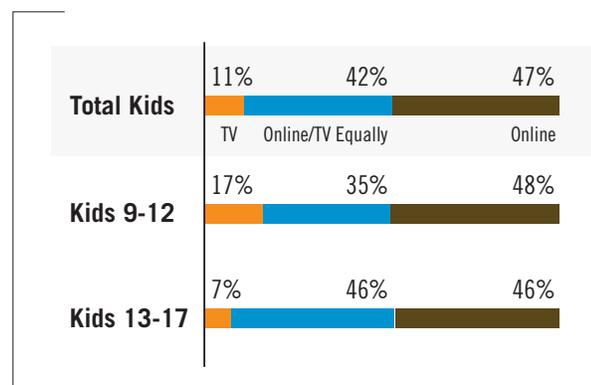
- kid-centric/friendly site-building tools;
- kid-oriented video, audio, or image editing tools;
- free software downloads;
- royalty-free multimedia content libraries (that kids can draw on to use on their profile pages); and
- tools for creating specialty content (e.g. logos, houses, cars, etc.). (Significant numbers of both children and parents tell us they would be favorably disposed to sponsors of these types of tools.)

Many providers also still haven't clued in to the extent that modern parents have a major voice in kids' online experiences, including tweens and even some teens. Both parents and kids are very interested in seeing more activities online that they can participate in together, which argues for more family networking applications, family-oriented online games and the like than we see today. And parents—along with a surprising proportion of kids and teens—say they would support sponsors of educational content and services. (In general, education is a greater focus of kids' online time than is commonly realized.)

Finally, in 2007, we saw some kids telling us that they had abandoned social media sites because they "didn't have a purpose, seemed pointless, random," which led us to predict more purpose-driven and collaborative sites and applications. Since then, we've seen the rise of niche social media sites with very specific purposes, the development of apps like Causes (for many months the most popular on Facebook, currently 2nd with 31+ million users), and the importing of Twitter-like conversation streams into individual profile pages to create a greater sense of community. We believe a greater sense of true community still waits to be created, in turn offering a major opportunity for sponsors and advertisers.

Many kids are building the Internet in their own image, engaging in a wide variety of authoring activities.

#### During TV/Online Multitasking, Online Is Primary Focus



Q. When you watch TV at the same time you're online, where do you focus most of your attention?