



Social Media/Networking Usage Trends Report

Prepared by: Travelers Enterprise Market Research

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Methodology

- Travelers sponsored a nationally representative survey among 2,060 adults across the U.S. The survey was conducted online from February 24 to February 26, 2009, by an independent market research firm.
- Respondents were asked approximately 20 questions regarding their awareness, usage, and attitudes about social media websites such as Facebook, LinkedIn and Photo Bucket. Demographic information such as age, income, educational attainment and gender was also captured in this survey.
- Travelers was not identified as the sponsor of the survey.

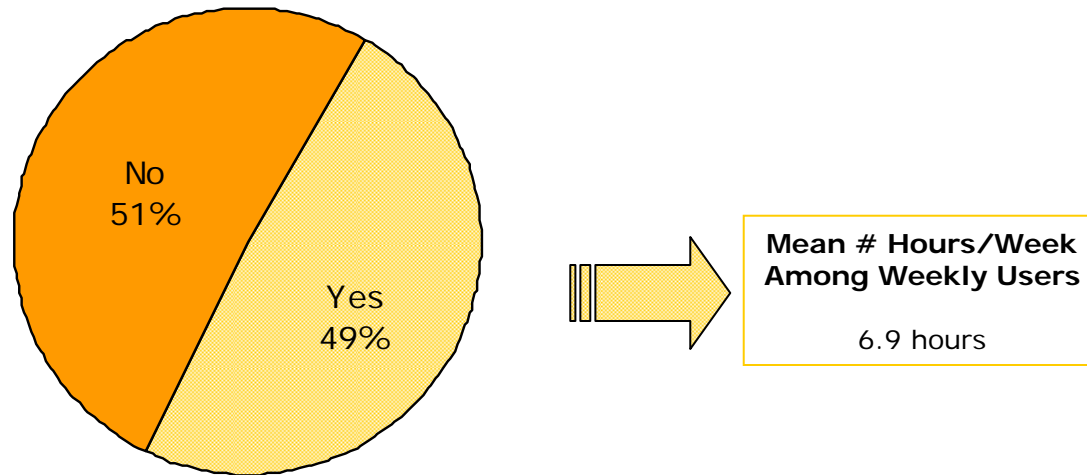
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Social Media Website Adoption in the U.S.

- About half of the adult population in the U.S. is actively using social media websites. Those using these sites weekly spend on average 7 hours in a typical week.

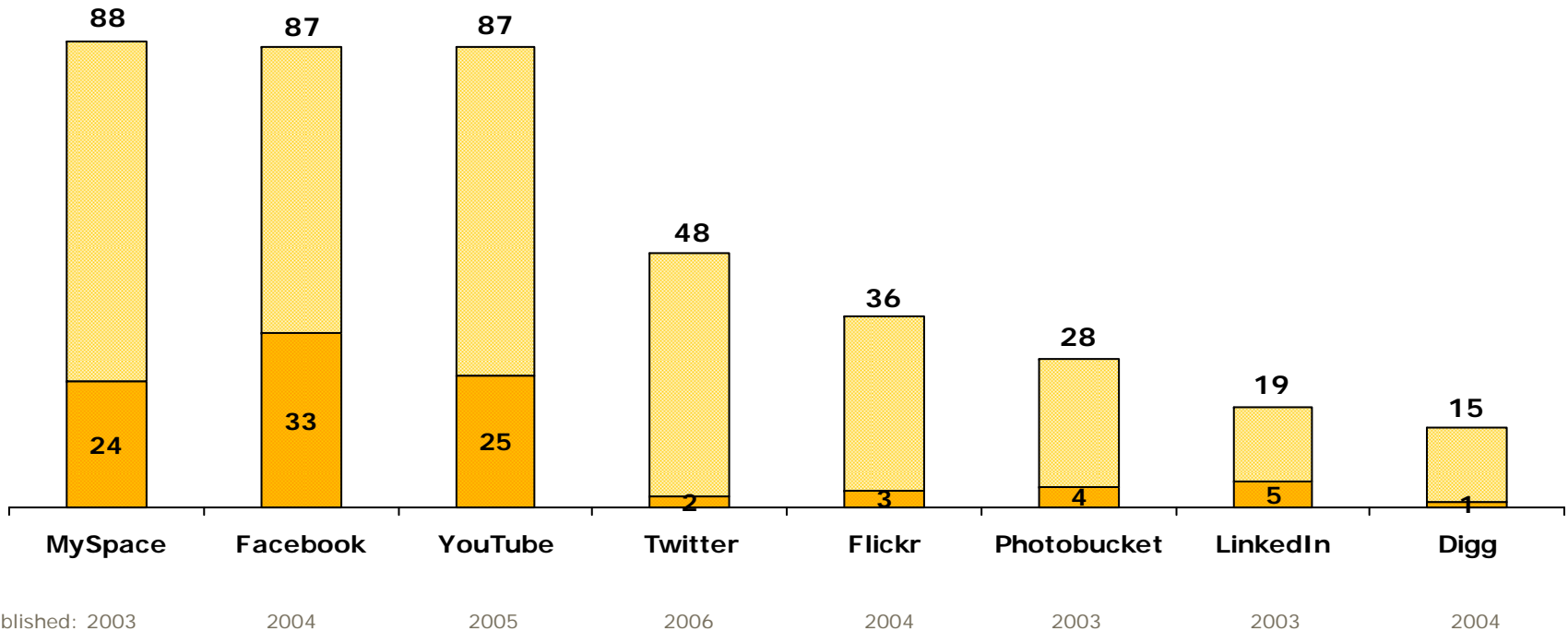
Use Social Media Websites & Post Personal Information



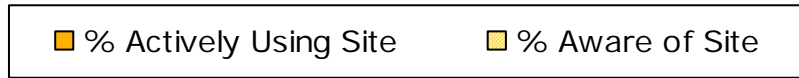
Base: Total Respondents (2,060)

Social Media Website Awareness & Usage

- Of the leading social media websites, MySpace, Facebook and YouTube are the most well known and popularly used. Newer sites such as Twitter, LinkedIn and Digg already have a following of early adopters.



Base: Total Respondents (2,060)



Demographic Groups Usage of Top 3 Sites

- The top three sites are not just limited to educated Gen X/Gen Ys, but rather have broad appeal.
- Table depicts % of that group who has used the website

Facebook

18 – 34	61%
35 – 44	37%
45 - 54	26%
55+	17%
Male	36%
Female	35%
High School or Less	29%
Some College	39%
College Grad +	43%
Income <\$50K	32%
Income \$50K-\$75K	32%
Income \$75K+	40%
Single/Unmarried	44%
Married	29%
Employed Full Time	37%
Unemployed	31%
Student	69%
Retired	15%

YouTube

18 – 34	44%
35 – 44	27%
45 - 54	23%
55+	13%
Male	35%
Female	19%
High School or Less	25%
Some College	28%
College Grad +	28%
Income <\$50K	22%
Income \$50K-\$75K	23%
Income \$75K+	28%
Single/Unmarried	35%
Married	19%
Employed Full Time	26%
Unemployed	26%
Student	53%
Retired	10%

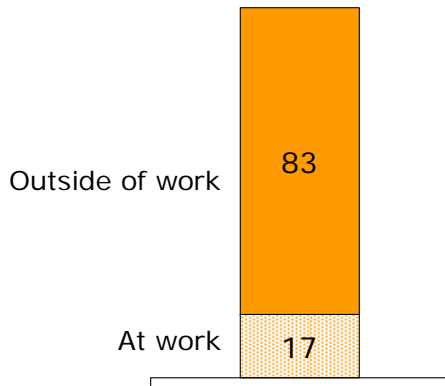
MySpace

18 – 34	44%
35 – 44	31%
45 - 54	19%
55+	8%
Male	26%
Female	25%
High School or Less	27%
Some College	26%
College Grad +	21%
Income <\$50K	31%
Income \$50K-\$75K	24%
Income \$75K+	20%
Single/Unmarried	32%
Married	18%
Employed Full Time	27%
Unemployed	24%
Student	34%
Retired	6%

Access Location & Purpose

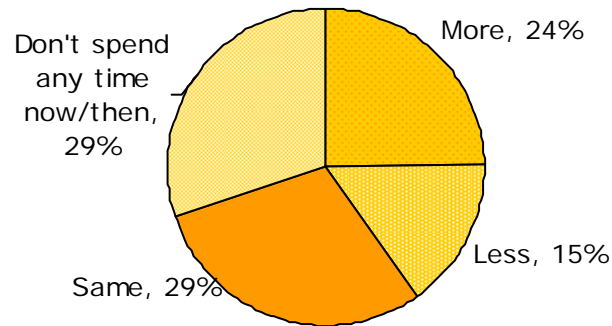
- Consumers generally access social media websites from outside of work. Mobile access (being able to log on regardless of place, time, or restriction), as well as technological advances (PDAs, wireless access) have made accessing these sites easier; it is not a surprise that social media site usage is on the upswing.
- While social media sites are primarily being used for personal reasons, about one in eight (13%) are using it for business purposes.

Where Do You Access Social Media Websites?



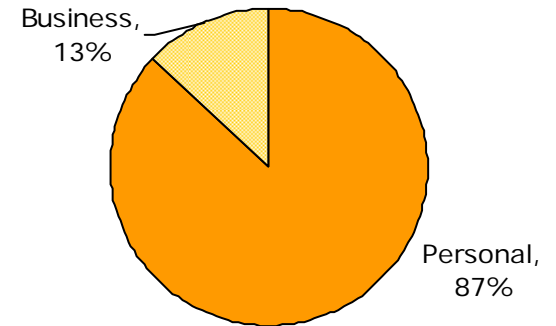
Base: Employed & Spend Time Online Weekly (720)

Using More/Less Versus 12 Months Ago?



Base: Aware of Social Media Websites (1,923)

For What Purpose?

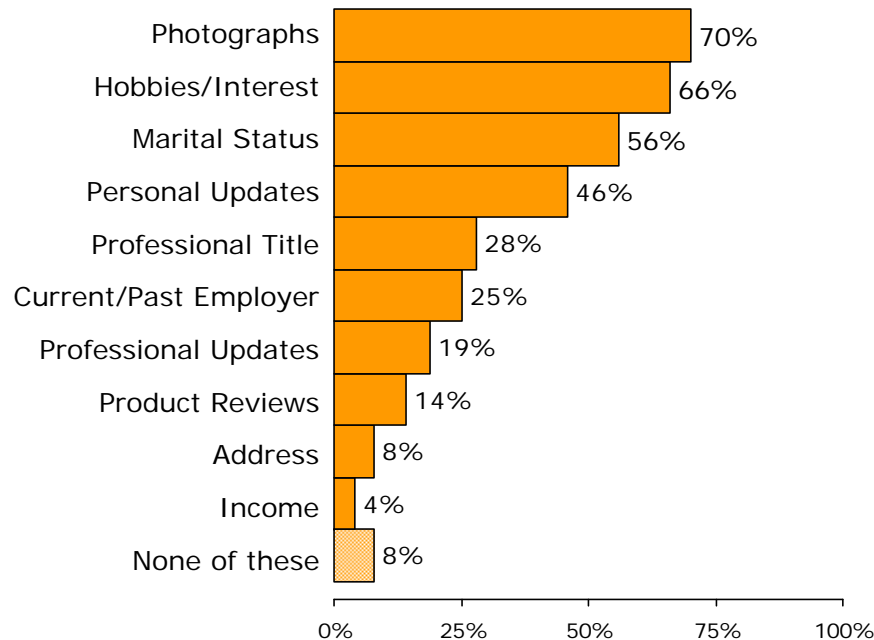


Base: Employed & Spend Time Online Weekly (720)

Typical Information Posted

- Social media sites tend to be more for personal versus business purposes; photographs, hobbies/interests, marital status and personal updates are the most commonly posted material.
- Of those posting information, about a quarter of adults are **posting career related information** such as title, place of employment and professional updates.
- Social media websites also serve as a forum for consumers to post their like or dislike of products/services.

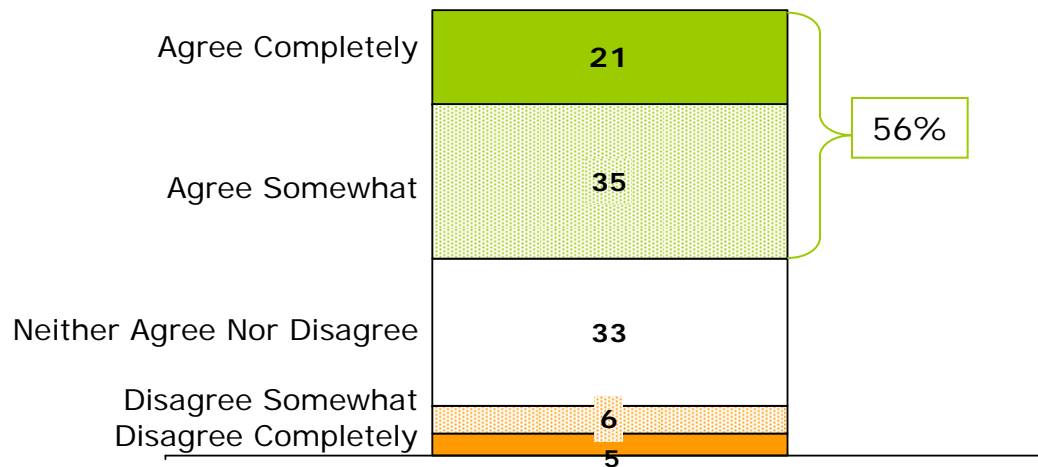
What Content Is Posted?



Social Media Credibility

- The majority of consumers view social media websites as “for fun” only, and take what they read with a grain of salt. Meanwhile, one in three consumers have not thought about it enough to express an opinion. On the other side of the spectrum, about one in ten consumers take social media websites seriously.

**“Social media websites are mostly for fun;
I do not take what I read online too seriously”**

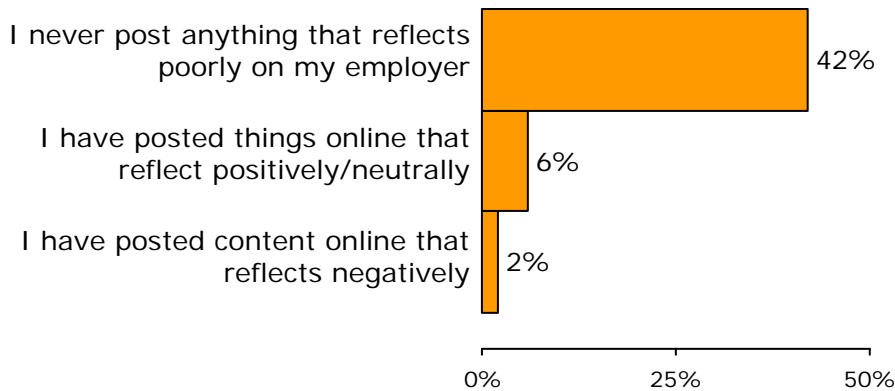


Base: Total Respondents (2,060)

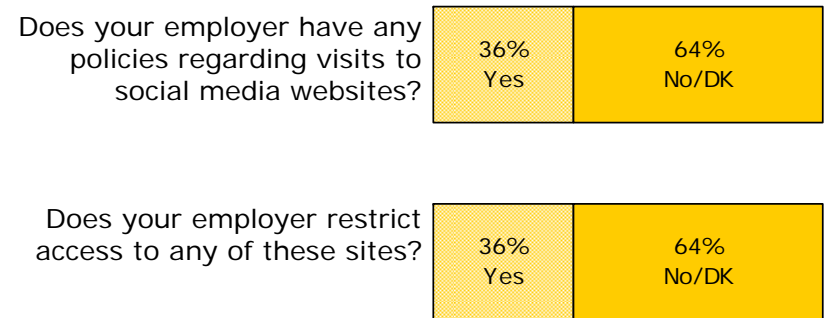
Social Media & The Employer

- While most people do not post comments online about their employers, a few do. Of those who do, their comments tend to be positive or neutral rather than negative.
- Roughly one in three consumers are aware of employer policies regarding social media website visits. A similar proportion say their employer restricts access to these sites during business hours.

Online Feedback on Employer



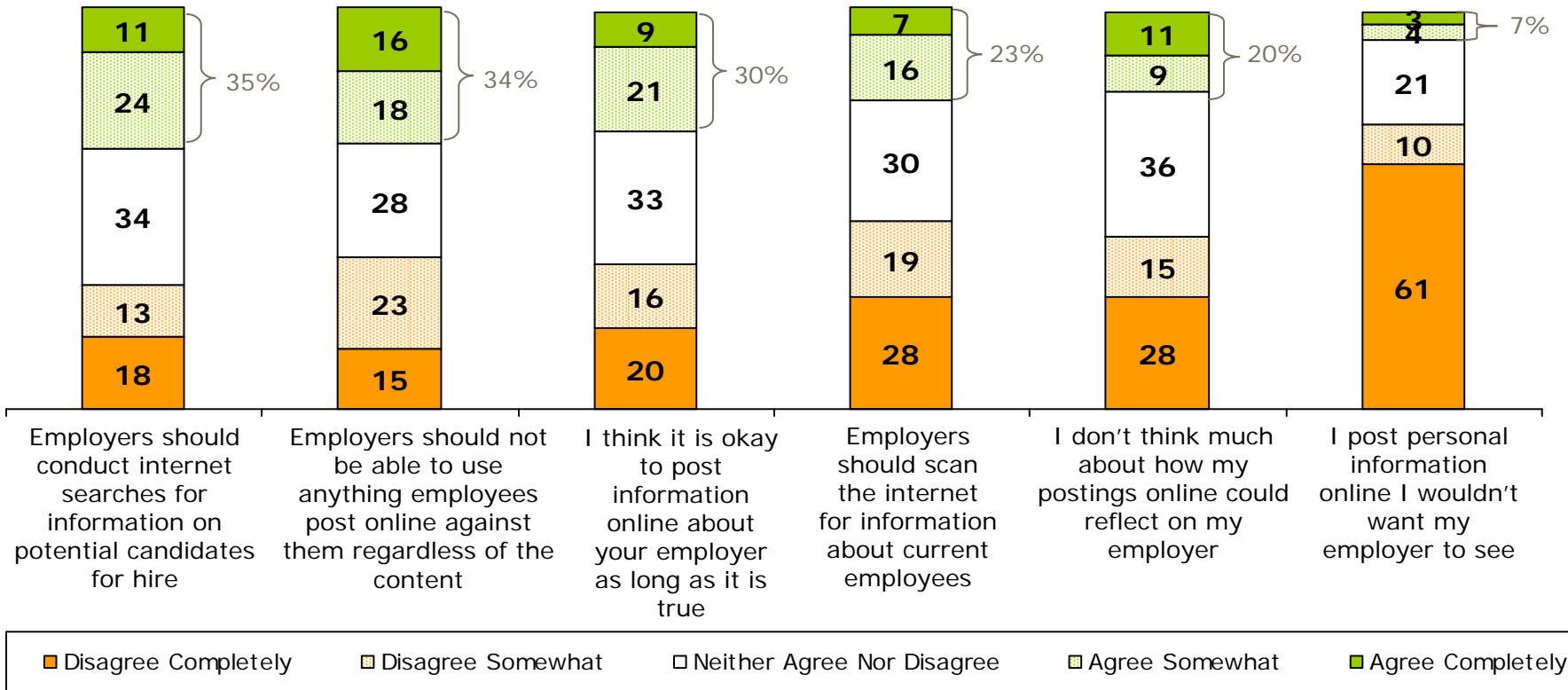
Employer Policies / Restrictions



11% of adults in the U.S. knows someone who "job vented" online.

Views on Social Media & The Employer

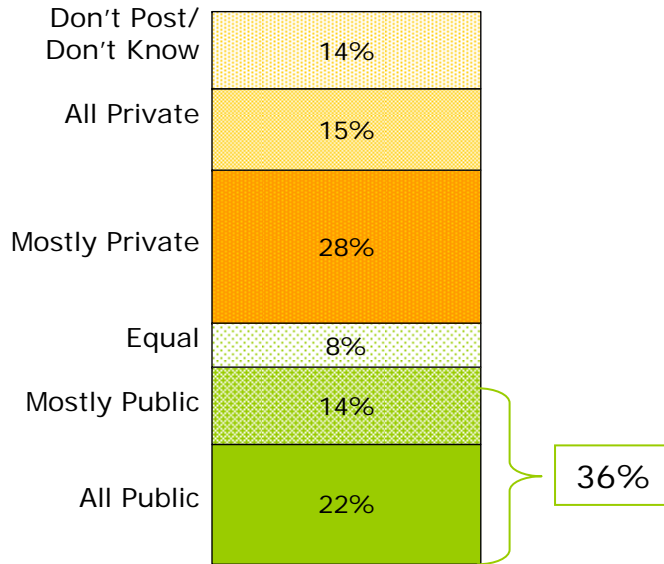
- Consumer views on employers using information they find online about potential and current employees run the gamut. Some believe it, others do not, while a sizable proportion have no stated opinion on the matter.
- More often than not, consumers do take into account the potential for their employers to encounter information about them online.



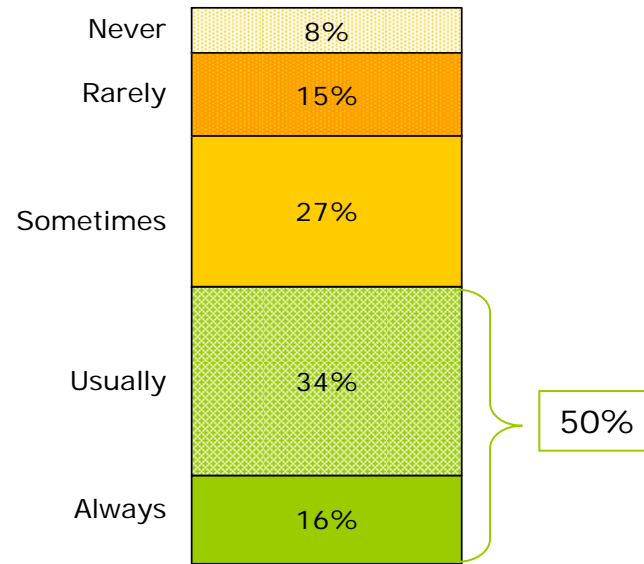
Privacy Settings

- About a third of adults have minimal concern for protecting their privacy, posting personal information and comments publicly either all or most of the time. Those who post negative opinions about products, services or their employer have even less regard for anonymity.

Privacy Settings on Social Media Websites



How Often Identify Self When Posting Online



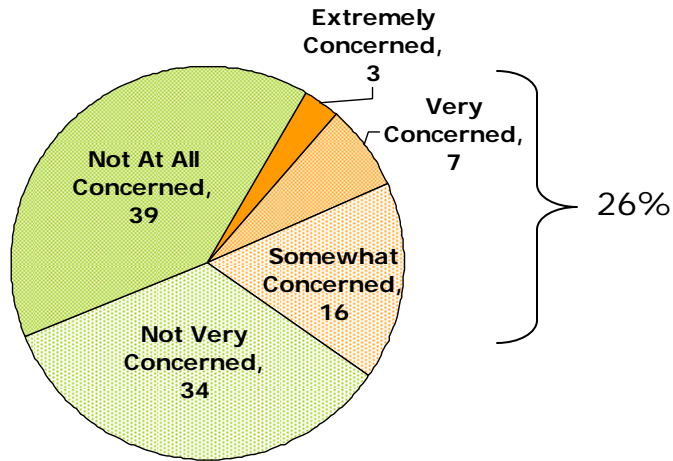
Base: Actively Use Social Media Websites (1,115)

Base: Have Posted Something Negative Online about Employer/Product/Service (406)

Privacy Concerns

- Approximately one in four consumers express concern over content they post online inadvertently hurting them personally or professionally. Most, however, express little to no concern.

Concerns About Information Posted Online Causing Personal Damage



Concerns About Information Posted Online Causing Professional Damage

