



Social Media Think:Lab

Marketing Center Münster &
Roland Berger Strategy Consultants

GERMAN SOCIAL MEDIA CONSUMER REPORT **2012/2013**

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FOREWORD

Social media are now an integral part of many consumers' everyday lives. In 2012, 92.6 % of German citizens with Internet access had at least one social network account. The country-wide acceptance and application of social media, together with the increasing distribution of smartphones, indicate a fundamental and ongoing change affecting all elements of the German society. The idea of the present study is to protocol this change in a representative manner. We do so by adopting three unique perspectives:

1. To better understand the basic coordinates of consumers' social media behavior, we calculate a Social Media Index and apply it to analyze social media consumption from different demographic and behavioral perspectives (Section 3).
2. We assess the importance of social media for the consumption of a wide variety of products and services. We determine the role of social media for purchase decision making and brand relationship formation, two essential sources of marketing value, by comparing social media with other media in our Media Importance Pie Charts (Section 4 and 5).
3. We take a close look at overall consumer communication behavior in private and business settings, finding substantive differences between private and business communication practices in Germany (Section 6).

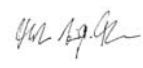
Essentially, this report provides indisputable evidence that social media have become a key element of German consumers' lives. We believe that several managers today ignore the dramatic dimension of change that social media bring about for consumers and firms, misjudging social media as just another new communication tool. The change caused by social media in terms of consumer perceptions and behavior cannot be left to agencies or social media managers alone, but must be reflected much deeper in company value chains. In this sense, the present report issues a warning, but also indicates the enormous business potential that the social media revolution offers to those who are able to act progressively and proactively.

This report was designed and carried out by the Social Media Think:Lab, a joint research initiative of the University of Münster's Marketing Center and Roland Berger Strategy Consultants. We have established the Think:Lab to better understand the social media-induced structural changes in society and businesses alike and to offer companies compelling ways to cope with these changes. Our research projects conform to the methodical and ethical standards of academic research. We are driven by curiosity and gladly share our research results openly with all who are also passionate about social media.

In this spirit, we wish you exciting new discoveries while reading!



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CONTENTS

1	Executive Summary	6
2	Introduction: Understanding the Consumer is Crucial	8
3	The Method: Survey Design	9
3.1	Data Collection	9
3.2	Calculation of the Social Media Index	11
3.3	Calculation of Media Importance Pie Charts for Consumption and Brand Relationships	12
4	The Results: Social Media Status-Quo	13
4.1	Social Media Demographics	13
4.2	Social Media Networks	15
5	The Results: Social Media and Consumption	18
5.1	General Insights	18
5.2	Social Media Importance Across Industries	19
5.3	What Drives Social Media Usage for Purchase Decisions?	21
5.4	What Drives Social Media Usage for Brand Relationships?	23
5.5	Consumer Versus Company-Perceived Importance of Social Media	25
6	The Results: Social Media and Consumer Communication Habits	27
6.1	General Insights on Private Communication Means	27
6.2	Heavy Versus Low Social Media Users	27
6.3	Private Versus Business Use of Social Media	28
7	Conclusion	30
8	References	31
9	Appendix: Industry-specific Media Usage Results	32
9.1	Product Industries	32
9.2	Service Industries	37
9.3	Retailing Industries	41
	Imprint	44
	Contact	45

1 EXECUTIVE SUMMARY

Our data reveals three major social media-induced trends in German society.

1

For social media, “infancy” is over! In 2012, social media became mainstream and are now heavily used by all strata of the German population. No matter what age, educational background, or income, and no matter where in Germany they live, everyone uses social media.

- The average Social Media Index, which measures social media usage intensity for German citizens is 7.5 (on our scale the daily use of a single social network such as Facebook warrants 3 points).
- The vast majority of Germans use social media several times a day.
- Social networks vary significantly with regard to the people they attract. On average, Twitter users are the most active people, whereas Xing users are the wealthiest – and both networks have the highest educated users.

2

People have started to use social media to improve major aspects of their daily lives, including those which affect businesses.

- In 2012, social media were already as important for consumers' purchase decisions in Germany as TV ads, traditional direct marketing, and public advertising. They were even more important than radio.
- Over the 19 industries covered by this report, social media influence the purchase decisions of German consumers on average by almost 8 percent.
- The more involved people are in a particular purchase, the more they use social media.
- On average, social media account for about 6 percent of the development of brand relationships.
- In private life, social media are the second most important communication medium for German consumers. Only the telephone is (still) more important.

3

Companies have not fully adapted to this change in society yet.

- German advertising expenditures still have a considerably skewed distribution, favoring the established media channels TV and print. Although traditional websites and social media explain more than 22 percent of German consumers' purchase decisions, German companies currently only spend 12 percent of their advertising budget on these channels.
- Companies still fail to communicate effectively with consumers through social media. Currently, 60 percent of German consumers cannot see much value in the social media messages they receive from companies.
- By and large, communication practices vary strongly between private and business communication. New means of communication and information sharing like social networks, messenger services, or location-based services are rarely used in German companies. Only 3 to 7 percent of German employees use these.

2 INTRODUCTION: UNDERSTANDING THE CONSUMER IS CRUCIAL

These days, social media constitute one of the most prominent challenges for marketing managers. A recent study by the Marketing Center Münster, which asked 146 German managers to name the most important entrepreneurial challenges over the next few years, finds that 89 % of the respondents name social media.¹

At the same time, we observe that most companies are taking only limited action in response to this enormous challenge. Social media are often treated as merely another communication channel whose value potential is unclear; companies thus have often limited their response to either doing nothing, hiring a "social media manager," or outsourcing social media communication to an agency. A holistic social media strategy that accounts for the specific characteristics of social media, and at the same time integrates this new channel deeply into the company's value chain, is often lacking. This managerial response obviously conflicts with social media's perceived importance.



One reason for the lack of far-reaching social media strategies can be seen in the lack of rigorous scientific findings or their insufficient diffusion among managers. The Social Media Think:Lab team of researchers has therefore introduced the pinball metaphor² as an intuitive model of market dynamics in the social media era. This model treats modern marketing as a chaotic but manageable game at a pinball machine.

In this game, company messages (pinballs) encounter many very active consumers (bumpers or slingshots). These consumers then either dramatically accelerate, transform, or thwart the original company-message and, by doing so, actively influence the course of the marketing game. We believe that in social media times, the pinball model has succeeded the old, mono-directional and mostly static model that interpreted marketing as playing bowling.

This report aims at looking into the black box – the pinball mechanics – by providing reliable data to enhance our understanding of the central element of the game – the active consumer. How do consumers employ social media? How closely are social media related to consumers' purchase decisions and their relationships with brands? And how does the importance of social media differ between consumers groups, but also between product markets?

Our approach to take the consumer perspective on social media is not an end in itself, but rather a necessity for managers to better understand the living environment of their customers. As strong customer orientation constitutes the backbone of all successful marketing actions. We consider such understanding as essential for becoming (or remaining) a successful operator of the pinball marketing machine.

3 THE METHOD: SURVEY DESIGN

3.1 Data Collection

The German Social Media Consumer Report 2012/2013 is based on a representative online survey of German Internet users who account for 75.6 %³ of the German population.⁴ Representativeness refers to gender, age, education, and provenance within Germany (federal state and population density); these attributes were used as quota criteria. Data collection took place during the last two weeks of July 2012.

The survey consisted of two parts. The first referred to general social media usage and was used to calculate the Social Media Index. The second part collected personal and consumption-related information from each respondent about two consumer industries. A total of 19 product, service, and retail industries were covered by the survey. The second part yielded the data to calculate the Media Importance Pie Charts and to compare the diffusion of social media for private and business purposes.

In total, we collected 3,236 observations from 1,618 survey respondents (Figure 1). To improve data quality, we used a conservative approach and excluded all observations for which the processing time from survey respondents was below a critical threshold, as the short completion time raised concerns about the quality of the answers of these observations. We also excluded observations which contained patterns. The final dataset consists of 2,474 observations. Note that the results did not change substantially when including all observations.

Overall, survey respondents considered the questionnaire to be very comprehensible and easy to complete. They rated its ease of completion at 4.4 on a five-point Likert scale (standard deviation: 0.79).

¹ Meffert and Sepehr (2012).

² Hennig-Thurau et al. (2010), Hennig-Thurau, vor dem Esche, and Bloching (2012), Roland Berger Strategy Consultants (2012).

³ Statista (2012a).

⁴ Hereafter, the expressions "German Internet users", "German population", and "Germans" will be used synonymously.



- Observations in initial dataset: 3,236
- Observations in final dataset: 2,474
- Observation period: July 2012
- Overall questionnaire acceptance: 4,38 out of 5 (Likert scale) 0,79 std. deviation

Figure 1: Data collection statistics.

Accuracy and our use of quotas during data collection led to a favorable distribution of observations in the dataset. To remove any remaining discrepancies between the sample and the German population, we weighted each respondent so as to obtain an accurate portrayal of the German population. As a result of the careful data collection process, weights were small, ranging only between 0.85 and 1.12 (Figure 2), so that weighting had only a marginal impact on the results reported in this document. Nevertheless, all results refer to the weighted sample.

Variable		Total # of Unweighted Cases	German Population	Weights
Gender	Male	1,295	52%	1.02
	Female	1,179	48%	0.98
Age	16-24	529	21%	0.96
	25-34	438	18%	1.18
	35-44	717	29%	1.03
	45-54	455	18%	0.93
	55 or older	337	14%	0.91
State	Baden Württemberg	252	10%	1.01
	Bayern	304	12%	0.96
	Berlin	190	8%	1.12
	Brandenburg	79	3%	0.96
	Bremen	25	1%	0.85
	Hamburg	93	4%	1.01
	Hessen	174	7%	1.04
	Mecklenburg-Vorpommern	53	2%	0.95
	Niedersachsen	236	10%	1.00
	Nordrhein-Westfalen	560	23%	1.02
	Rheinland-Pfalz	107	4%	1.01
	Saarland	29	1%	1.06
	Sachsen	141	6%	0.92
	Sachsen-Anhalt	72	3%	0.92
	Schleswig-Holstein	86	3%	0.94
	Thüringen	74	3%	0.92
Education	„Hauptschul-“degree	843	34%	0.91
	„Realschul-“degree	783	32%	1.05
	„Abitur“	848	34%	1.07



Figure 2: Sample description and comparison with German population.

The questionnaire contained cross-sectional data from 19 different product, service, and retail industries (2,474 observations in total). The analyzed industries and the sizes of the respective subsamples are listed in Figure 3.

Industry	# of Observations	Industry	# of Observations
Product Industries	1,125	Service Industries	1,073
1. Automotive & Private Transportation (bikes, motorcycles, etc.)	126	10. Banking & Insurance	135
2. Hardware Store Products	114	11. Small Businesses (barbers, craftsmen, bakeries, etc.)	126
3. Home Appliances	127	12. Recreational Services (entertainment parks, cinemas, gyms, etc.)	135
4. Groceries	119	13. Health Care	136
5. Media Products (books, movies, music, games)	134	14. Communication Services	147
6. Apparel	120	15. Travel (providers, airlines, hotels, etc.)	127
7. Sports Goods & Leisure Wear	129	16. Restaurants & Bars	137
8. Entertainment Electronics	128	17. Public Utility Services	130
9. Furniture & Home Decoration	127	Retail Industries	276
		18. Offline Retailing	133
		19. Online Retailing	143

Figure 3: Analyzed industries and sample sizes.

3.2 Calculation of the Social Media Index

In order to measure the status quo of German consumer usage of social networks, we developed the Social Media Index (SMI). The SMI reflects the extent to which consumers in Germany use social networks. Higher numbers indicate that consumers register with more social networks or use their current social networks more often. Specifically, we asked respondents how frequently they use each of their social networks, with answers ranging from "several times a day" to "at least once a month". They could choose from a list of the 47 most popular German social media platforms. To calculate the Social Media Index, we summed the social network usage frequency for each consumer across these 47 social networks. The SMI equals 1 if someone has registered with one social network and uses it monthly. A value of 2 can be obtained by either the weekly use of a single social network or by the monthly use of two social networks, and so forth. The theoretical maximum of the index is 188 which would be reached if a consumer uses all 47 social media platforms several times a day (Figure 4).

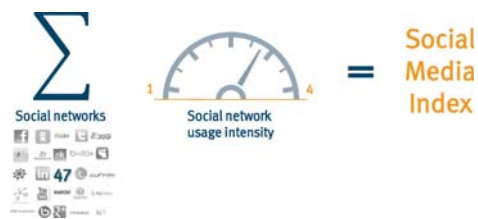


Figure 4: The Social Media Index Scale.

3.3 Calculation of Media Importance Pie Charts for Consumption and Brand Relationships

A major objective of this research was to shed light on the impact of social media information on two key aspects of consumer behavior, namely purchase decisions and brand relationships. This implies the comparison of social media information with other more established information sources, including personal face-to-face communication, but also advertising. To display the perceived importance of all major information sources (including social media), we produced Media Importance-Pie Charts for both purchase decisions and brand relationships. To create the Media Importance Pie Charts, each respondent was asked to name his/her last purchase and his/her favorite brand for each of the assigned two of 19 industries covered by our survey. This approach was taken to create a realistic setting. For the last purchase, each respondent rated the importance of different information sources on a seven-point Likert scale ranging from "not important at all" to "very important". The importance of a specific information source was determined through dividing the importance rating for this source by the sum of all source importance ratings. Figure 5 illustrates this approach and specifies the information sources considered. Note that to rule out decisions which were based solely on routine and to avoid measurement artifacts, we restricted answers to products/services the consumer had not purchased before.

How Important were these Information Sources for Your Decision to Buy Product/Service XYZ?

Media Importance	1	2	3	4	5	6	7
Radio		X					
TV			X				
Social Media							
Magazines & Newspapers	X						
...							X

Exemplary Media Importance-Pie Chart Purchase Decision



Figure 5: Exemplary Media Importance Pie Chart for purchase decisions.

The same approach was used for brand relationships (see Figure 6). Here, the questionnaire also included the respondent's experience with the product/service, in addition to company sources and traditional forms of personal communication.

How Strong did these Factors Influence Your Attitude and Relationship to Brand XYZ?

Media Importance	1	2	3	4	5	6	7
Radio	X						
TV		X					
Social Media							
Magazines & Newspapers	X						
...							X

Exemplary Media Importance-Pie Chart Brand Relationship



4 THE RESULTS: SOCIAL MEDIA STATUS-QUO

4.1 Social Media Demographics

Social media are no longer a phenomenon used only by a fringe group of highly active Internet users. Our data reveals that social media have become mainstream in German society. Whether one considers gender, age, education, or geographical location, social media have arrived in all classes and strata of society. The average German Internet user⁵ is registered with three (average 3.1; standard deviation 2.9) social media platforms. Only 7.4% of Germans with access to the Internet do not use any social media platform at all yet (Figure 7). 21.4% of Internet users log into five or more social networks frequently. Our Social Media Index (SMI) reveals a more concise picture of German social media usage. In our representative sample of German consumers, the mean SMI equals 7.5, indicating that the "average" German consumer uses social networks quite intensively – either by accessing two social network accounts several times a day, by accessing eight accounts once a month, or a combination in between – which is usually the case. The median of the SMI is six, and the modal value⁶ is 4.5. The non-linear course of the SMI across deciles⁷ (Figure 8) reveals that a relatively small group of consumers uses social media very heavily.

No. of Social Media Accounts	Percent of Internet Users
0	7.4%
1	21.4%
2	23.1%
3	15.6%
4	11.2%
5	8.6%
6	5.3%
7	2.5%
8	2.0%
9	0.7%
10	0.9%
11	0.2%
12	0.0%
13	0.1%
14	0.4%
> = 15	0.8%
Total	100.0%

Figure 7: Distribution of the number of social media accounts (n = 2,474).

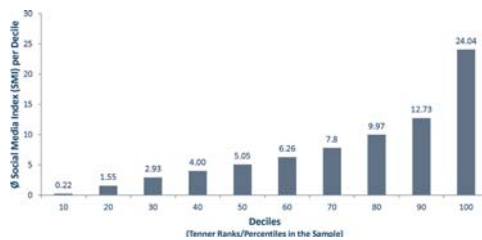


Figure 8: Social Media Index across sample deciles (n = 2,474).

⁵ If Section 3 was skipped: Internet users account for 75,6% of the German population (Statista 2012a). Hereinafter, the expressions "German Internet users", "German population", and "Germans" are used synonymously.
⁶ Modal value: the value that was found most frequently in the sample. ⁷ Decile: the 10th, 20th, 30th, ... percentile in the ranked sample.

Looking at subgroups, males are not significantly more active social media users than females (t-test: $t(2.319) = 1.061$; $p = 0.289$). Sorted by age, the most active segment is 16–24 years old, followed by the group of 25–34 year olds. Social media usage decreases in the following segment, but increases somewhat for 45–54 year-olds. The SMI of the 55–64 year olds drops off by 33.8 %. However, with an average SMI of 5.2, these older consumers now also use social media to a substantial degree (Figure 9). This again emphasizes the broad spread of social media among the different parts of the German population.

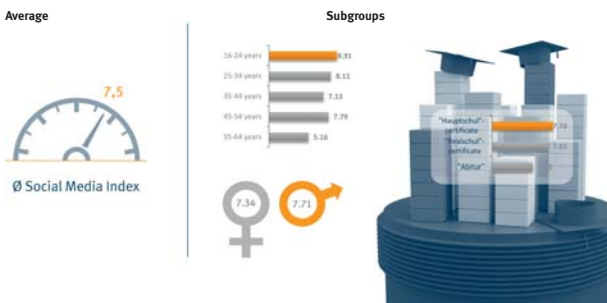


Figure 9: Social Media Index for different demographic subgroups (n = 2,474).

Social media usage is not exclusive to the upper social stratum. On the contrary, people with a "Hauptschul"-certificate slightly outperform higher levels of education in terms of their SMI. However, this difference is not statistically significant (t-test between "Hauptschul"-certificate and "Abitur": $t(1.446) = 1.282$; $p = 0.200$). But compared to consumers with a "Hauptschul"- or "Realschul"-certificate, people with "Abitur" are using social media less intensively.

Looking at the geographical distribution shown in Figure 10, Germans from northern federal states (Bundesländer) are significantly more active in social networks than those living in the south of Germany (t-test: $t(2.409) = 1.974$; $p = 0.049$). Comparing consumers from the east and the west of Germany, we find no differences between the eastern states ("Neue Länder") and the western states ("Alte Länder"). The most social-media-active federal states are "Nordrhein-Westfalen", "Brandenburg", and "Hamburg"; the least active are "Hessen", "Baden-Württemberg", and "Sachsen-Anhalt".

Similar findings apply to social media usage in urban and rural regions. Again, we could find no significant differences in SMI between people living in villages or small towns and people living in cities (t-test: $t(2.472) = 1.777$; $p = 0.076$).

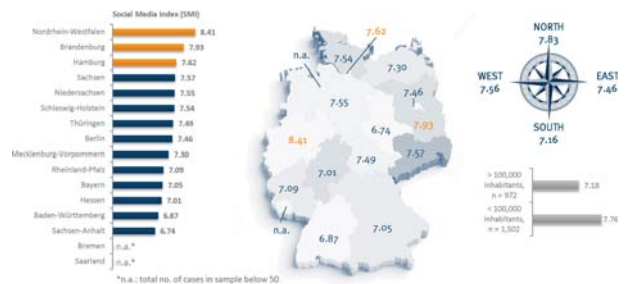


Figure 10: Social Media Index for different regional subgroups (n = 2,474).

4.2 Social Media Networks

The average German consumer is online for two to three hours each day. Only 2.6 % of the German population surf the Internet less than 30 minutes daily, while every fourth German spends more than four hours online (Figure 11).

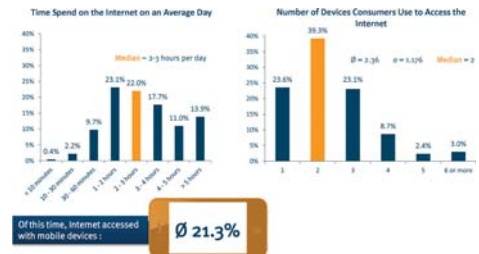


Figure 11: Social Media Index for different regional subgroups (n = 2,474).

Figure 11 also shows that the diffusion of smartphones and tablet computers has created a broad distribution of secondary devices. More than three quarters (76.4 %) of German Internet users surf the net with at least two Internet-ready devices. Data on mobile Internet access points into the same direction; overall, the average consumer accesses the Internet in 21.3 % of the cases with mobile devices, which corresponds with an average mobile usage time of between 25 to 38 minutes each day.

Figure 12 looks at the different social networks. Facebook is by far the largest social media platform in Germany, 72.1 % of German Internet users report that they have a Facebook account. YouTube, the second largest network among German consumers, reaches 38.7 % of Germans.

SOCIAL MEDIA TOP 10

Top 10 Social Media Platforms	% of German Population (computer users)	Of These Usage at Least Once a Day
Facebook	72.1%	77.00%
YouTube	38.7%	41.60%
StayFriends	20.6%	13.20%
Wer-kennt-wen	19.5%	31.40%
Google+	19.4%	49.80%
VZ-Netzwerke	11.9%	29.70%
Xing	11.7%	23.50%
Twitter	10.5%	45.10%
MyVideo	9.4%	25.90%
Jappy	6.5%	25.5%

Figure 12: Most used social media platforms (n = 2,474).

We find two more results particularly revealing. Firstly, in just over one year since its launch, Google+ became the fifth largest social network in Germany by July 2012. Secondly, the microblogging network Twitter, which was long time believed to be only a niche network in Germany, now holds rank 8. Every tenth German Internet user reports to have a Twitter account.

Facebook, YouTube, Google+, and Twitter are also distinct from other social platforms with respect to frequency of usage. For all four, more than 40 % of their members report accessing the networks on a daily basis. Here again, Facebook is at the top with 26.6 % of its users reporting logging in once a day; 50.4 % reporting even logging in multiple times per day.

How do users differ among social networks? A look at age distribution reveals some interesting differences (Figure 13). Facebook, YouTube, and Twitter all have a left-skewed distribution, indicating more younger than older users. The reverse is evident for Wer-kennt-wen. This network has the largest percentage of people aged 35 years or more. Xing and Google+ are in between both groups and yield a bell-shaped age distribution. These six networks also differ with regard to other criteria, as shown in Figure 14.



Figure 13: Age distribution for leading social networks (n = 2,474).

Regarding social media usage intensity, Facebook is closest to the average. This is not surprising, since Facebook is by far the largest social network and therefore must have patterns comparable to the German average. Wer-Kennt-Wen and YouTube users are slightly more active in social media (Social Media Indices of 11.9 and 11.5). We find the most active users on Xing, Google+, and Twitter. Twitter users take the lead with a Social Media Index of 17.9, about twice that of the average Facebook user.



Figure 14: Usage intensity for Leading Social Networks.

A look at education and income patterns also reveals interesting insights. Xing and Twitter both have the most educated users, holding an "Abitur" on average. In contrast, Wer-Kennt-Wen users on average own a "Hauptschul"-certificate. Looking at income, Xing users are the only ones of these six networks with an average net income of 2,000–2,999 Euro, which makes them not only the best educated, but also the top-earning group. All others share an average income of 1,000–1,999 Euro.

5 THE RESULTS: SOCIAL MEDIA AND CONSUMPTION

5.1 General Insights

Over the last few years, consumer purchase behavior has been constantly changing. For many years now, the Internet has not only influenced consumer purchase habits, but also how they make purchase decisions. Figure 15 shows the average impact (across all analyzed industries and consumer groups) of key information sources on consumer purchase decisions of new products (left pie chart) and consumer relationship with their preferred brand within a given product, service, or retail category (right pie chart).

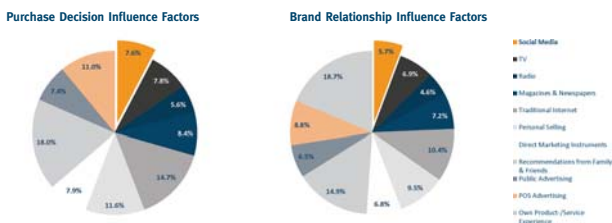


Figure 15: The role of Social Media and other information sources for consumer behavior (n = 2,474).

Looking at product or service purchases in Germany, information from social media is already responsible for 7.6 % of consumer purchase decisions on average. This is not significantly different to the impact of TV, traditional direct marketing, and public advertising.⁴ Social media is significantly more influential than radio for purchase decisions ($Z(2.472) = -10.178; p < .01$). According to the respondents in our sample, the most important source for purchase decisions is still traditional face-to-face recommendation, despite the spreading of social networks. However, the picture is somewhat different for brand relationships. In this respect, the overall influence of social media is still relatively small – social media contribute only 5.7 % to the existence of successful brand relationships. Although this number, being significantly different from zero, clearly points to the relevance of social media for brand relationships, it also demonstrates that other sources currently play a larger role for consumers; it is the second weakest source of all information sources. Brand relationships are determined mainly by consumers' own usage experiences with a brand (18.7 %), but are also influenced by traditional face-to-face communication (14.9 %).

⁴ We tested whether percentages were different using Wilcoxon tests here and in the remainder of the report. Results: Social media and TV ($Z(2.472) = -1.536; p = 0.125$), social media and traditional direct marketing ($Z(2.472) = -1.526; p > 0.127$), social media and public advertising ($Z(2.472) = -0.559; p = 0.576$).

The different social media findings for purchase decisions and brand relationships could be attributed to a general observation we made in our study (and discuss in more detail in Section 6). That is with regard to social media, companies are still lagging behind private usage. Consumers are able to use social media for purchase decision-making not because companies have established powerful social media presences, but first and foremost because of the broad distribution of purchase-related information in the social web from other consumers. Brand relationships, however, are much more idiosyncratic, requiring a stronger social media engagement by the brand. This engagement cannot really be outsourced to or compensated for by other consumers' social media behavior.

The results also reveal that the Internet plays a crucial role for consumer decision making today. Information from traditional (i.e. non-social media) Internet sites explain 14.7 % of consumers' average purchase decisions, which is the strongest media influence factor for purchase decisions of all information sources. Only direct recommendations from the private sphere of consumers are still more important. The same is true for brand relationship building, where information from traditional Internet sources accounts for 10.4 % of the brand relationship. Again, this is the strongest non-personal influence factor for brand relationship formation.

5.2 Social Media Importance Across Industries

Figure 16 takes a more differentiated look, revealing that the importance of social media information for consumer decision making differs strongly between industries.

Social Media Importance per Industry



Figure 16: The role of social media for purchase decision making across industries.⁵

⁵ For the number of observations in each industry, please refer to Appendix A.

Media Products, Restaurants, and Online Retailers are each leaders in their particular industry concerning social media importance for consumer purchase decisions. Not surprising, we observe a general tendency that the more digital components a product or service has, the more developed the particular industry already tends to be.

Exceptions are high-involvement industries (for further information on the role of consumer involvement for social media usage, see the next section) and industries in which third-party information providers offer valuable information. The catering industry is a good example for the latter; except for a few national restaurant chains, the restaurant market overall is mostly atomistic with many small and independent outlets. Nevertheless, they are service industry leaders in social media usage for purchase decision-making. This is mainly a result of the many successful digital restaurant guides like Qype, Yelp, Restaurant-Kritik, Tripadvisor, etc.

Figure 17 demonstrates the same industry-level insights for brand relationships. Social media are currently most influential for brand relationship formation for media products, communication services, and the online retailing industry. However, the differences between them are substantial; for online retailing, social media accounts for 9.4 % of brand relationships, which is almost twice as much as the overall average. The low importance of social media for restaurants (4.8 %) shows that it is not the companies themselves that impress consumers with valuable social media content, but rather the independent information providers named above.

A more detailed analysis of each particular industry can be found in the Appendix of this report.

Social Media Importance per Industry



Figure 17: The role of social media for brand relationships across industries.

5.3 What Drives Social Media Usage for Purchase Decisions?

We expected consumer involvement with a particular product or service to play a distinctive role in the utilization of social media, as involvement with a product, service, or retailer should be considered a precondition for social media engagement. Using an established multi-item involvement measure¹⁶, our data supports this expectation, as can be seen in Figure 18, which plots industry involvement against social media impact for purchase decision making. The figure shows that the more important the purchase for the consumer, the more intensely he/she uses social media for information purposes before the purchase. An Analysis of Variance¹⁷ provided evidence that this relationship between involvement and the use of social media for purchase decisions is also highly significant ($F(2,473) = 8.108; p = 0.000$).



Figure 18: The link between consumer involvement and social media relevance for purchase decisions.

As people tend to use information from all media types more intensively for high involvement purchases, we tested whether this result remains when we control for the general increase in information needs for high involvement products. Specifically, we calculated the relative importance of each information source for each respondent (by dividing the respondent's score for social media by the sum of the respondent's scores for all kinds of media). Using this relative social media usage values, a second ANOVA could prove that consumer involvement with a product/service and the use of social media for purchase decisions remains highly significant ($F(2,473) = 2.389; p = 0.001$). This means that with an increase in involvement, consumer reliance on social media increases disproportionately.

Does the impact of involvement on the usage of social media for purchase decisions remain if other factors are incorporated as well? And which other factors could that be? To answer these questions, we conducted a stepwise linear regression to determine whether, in addition to involvement, demographic or behavioral consumer characteristics provide incremental insights into the importance of social media for purchase decisions. In addition to these consumer characteristics, we also included industry information¹⁷ to detect additional patterns. The chosen statistical method – the stepwise regression procedure – is able to autonomously pick from a pool of variables that particular set of factors which significantly explains characteristics of the dependent variable (here: social media usage for purchase decisions). Figure 19 shows the statistical results of the regression analysis. Figure 20 summarizes the main findings.

¹⁶ Schneider and Rodgers (1996).
¹⁷ ANOVA – A statistical method for testing relationships between variables.
¹⁸ Industry information: One dummy variable for each of the 19 industries.

Model No.	R	R Square	Adjusted R Square	Std. Error of the Estimate
7	0.250	0.062	0.059	0.09886

Included Variables	Standardized Coefficients Beta	t	Sig.
(Constant)		-4.359	0.000
Mobile Internet Access (%)	0.130	5.961	0.000
Industry: Online Retailing	0.116	5.414	0.000
Net Income	-0.089	-4.175	0.000
SMI	0.081	3.699	0.000
Involvement	0.070	3.216	0.001
Industry: Media Products	0.059	2.710	0.006
Industry: Hardware Store Products	-0.042	-1.985	0.047

Dependent Variable: Relative Social Media Usage for Purchase Decisions

Figure 19: Results of regression analysis to explain social media usage for purchase decisions (n = 2,474).

SIGNIFICANT RELATIONSHIPS	NON-SIGNIFICANT RELATIONSHIPS
People whose purchase decisions are strongly influenced by social media are... <ul style="list-style-type: none"> • highly active in social media and surf a lot with mobile devices, • consider their purchases as high involvement decisions, and • come from lower income groups. Currently, people significantly use information from social media a lot for purchases in these industries: <ul style="list-style-type: none"> • online retailing and media products. Currently, social media information is significantly not used for: <ul style="list-style-type: none"> • hardware store purchases. 	People whose purchase decisions are influenced by social media are NOT significantly different from other people concerning... <ul style="list-style-type: none"> • sex, • age, • education, and • general internet usage (total surfing time, number of used devices). Currently, information from social media is becoming more important for all remaining 16 industries. However, these relationships are not significant yet.

Figure 20: Key findings of regression analysis to explain social media relevance for purchase decisions (n = 2,474).

The regression results are in line with our overall social media findings. As a result of the broad distribution of social media across segments, people with all demographic backgrounds already use this media type for purchase decisions, so that we find no significant impact of these factors. Only people with a low income tend to consult social media more often than average. As money is more of an issue for them, purchases need to be considered more carefully. Looking at industries, only online retailers and media products stand out positively with regard to social media importance. Concerning hardware products, social media information is currently less important for decision making.

5.4 What Drives Social Media Usage for Brand Relationships?

Most of the findings reported for purchase behavior also apply to social media and brand relationships. Again, we first ran an ANOVA to assess the importance of consumer involvement and then calculated a stepwise linear regression. Figure 21 shows the relationship between respondents' involvement and their usage of social media for brand relationships. Again, this relationship is highly significant no matter if we control for the general increase in involvement ($F(2,473) = 1.779; p = 0.022$) or not ($F(2,473) = 5.046; p = 0.000$).



Figure 21: The link between consumer involvement and social media relevance for brand relationships.

In the regression results reported in Figures 22 and 23, we found that the same consumer characteristics influence social media usage for brand relationships as for purchase decisions, namely involvement, overall social media usage (SMI), mobile Internet usage, and income. However, the industries where social media usage is relevant differ somewhat. For brand relationships, the market seems to be more polarized, because more industries stand out positively or negatively than in the previous calculation. Online retailers, media products, entertainment electronics, and the communication services industry already apply social media with positive effects for brand relationships. By contrast, public utility providers do not yet seem to have established access to this channel.

Model No.	R	R Square	Adjusted R Square	Std. Error of the Estimate
9	0.312	0.097	0.093	0.06575

Included Variables	Standardized Coefficients Beta	t	Sig.
(Constant)		3.267	0.001
SMI	0.149	6.905	0.000
Industry: Online Retailing	0.161	7.615	0.000
Mobile Internet Access (M)	0.140	6.519	0.000
Net Income	-0.069	-3.271	0.001
Involvement	0.056	2.568	0.010
Industry: Public Utility Services	-0.044	-2.068	0.039
Industry: Media Products	0.056	2.639	0.008
Industry: Entertainment Electronics	0.051	2.426	0.015
Industry: Communication Services	0.046	2.145	0.032

Dependent Variable: Relative Social Media Usage for Brand Relationship Formation

Figure 22: Results of regression analysis to explain social media relevance for brand relationships (n = 2,474).

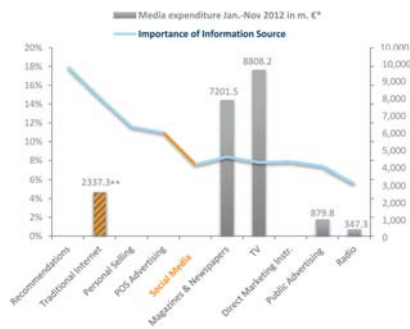
<p>SIGNIFICANT RELATIONSHIPS</p> <p>People whose brand relationships are strongly influenced by social media are...</p> <ul style="list-style-type: none"> highly active in social media and surf a lot with mobile devices, are highly involved with the brand, and come from lower income groups. <p>Currently, social media have significantly influenced people's brand relationships in these industries:</p> <ul style="list-style-type: none"> online retailing, media products, entertainment electronics, and communication services. <p>Currently, social media information is significantly not used for:</p> <ul style="list-style-type: none"> building brand relationships with public utility providers. 	<p>NON-SIGNIFICANT RELATIONSHIPS</p> <p>People whose purchase decisions are influenced by social media are NOT significantly different from other people concerning...</p> <ul style="list-style-type: none"> sex, age, education, and general internet usage (total surfing time, number of used devices). <p>Currently, information from social media is becoming more important for all remaining 14 industries. However, these relationships are not significant yet.</p>
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Figure 23: Key findings of regression analysis to explain social media relevance for brand relationships (n = 2,474).

5.5 Consumer Versus Company-perceived Importance of Social Media

Our data also reveals that companies still behave quite backwardly when it comes to marketing expenditure in new media channels. When comparing 2012 media expenditure figures of German companies¹³ and purchase decision influence factors determined in our study, we find a clearly unequal distribution in favor of TV and print media (see Figure 24). Although Internet presences and social media sites together influence consumer purchase decision by 22.3 %, German companies currently only spend 11.9 % of their advertisement budgets on these channels. These numbers point at a substantial imbalance in terms of budgeting decisions.

Importance of Information Sources vs. Media Expenditure



* Media spending taken from Statista 2012b.
 ** Online media spending includes traditional Internet and social media.
 Figure 24: Comparison of media expenditure and information source importance.

We found interesting consumer patterns when looking at subgroups of our sample which indicate the problematic nature of this imbalance. Figure 25 shows the distribution of importance of our measured influence factors for purchase decisions for three consumer groups. The dark gray line belongs to the 20 % of consumers in our sample who have the lowest Social Media Index (SMI) values. The graph shows that these people are strongly influenced by a small number of factors only (i.e., recommendations from friends and family, traditional Internet content, personal selling, advertisements at point of sale (POS)). In contrast, the dark blue line refers to the 20 % of people who use social media the most. Their influence pattern for purchase decisions is clearly distinct from the other group – these consumers tend to balance information from multiple sources when making purchase decisions. Thus, the influence of a single media source has declined for them, whereas the importance of all sources in total has increased. From a company perspective, sending consistent messages across all channels is therefore very important for influencing this group. If we further assume that social media usage will increase in the future, it is very likely that this segment is about to become more important. We believe the dark blue line will be the new reality to which advertisers need to adapt.

¹³ Statista (2012b).

Comparison of the Importance of Information Sources for Purchase Decisions for Three Consumer Segments

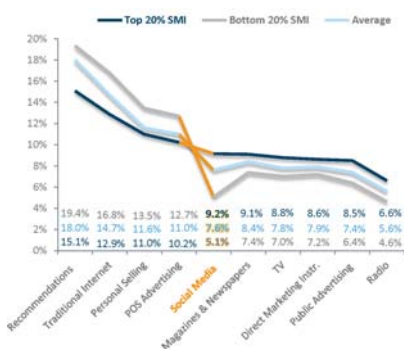


Figure 25: Distribution of influence factors for purchase decisions for social media user groups.

In this context, we find it important that consumers are not overly satisfied by the way companies have delved into the social media realm (see Figure 26). When asking our respondents whether they perceive messages that companies have sent them via social media as valuable information, about 60 % responded negatively to this question. Less than 20 % responded positively. Similarly, almost 70 % said that they do not like to communicate with companies through social media in general, and some 40 % even felt disturbed by company messages. These numbers indicate that effective social media marketing is a substantial challenge that most companies still have to learn about and confront.



Figure 26: Consumers' overall opinion on firms' social media activities.

6 THE RESULTS: SOCIAL MEDIA AND CONSUMER COMMUNICATION HABITS

6.1 General Insights Into Private Communication

Today, social media are firmly anchored in consumers' daily communication and have assumed an important position in their everyday lives (Figure 27). On average, social media are already the second most important means of private communication. 45.1 % of Germans communicate through social networks on a daily basis. Only the telephone, with 53.2 % daily usage, is applied more often. Email ranks third and is used daily by 43.4 % of German consumers. In contrast, traditional letters and postcards are written daily only by 3.4 % of the population.

Means of communication...	Private Communication	
	At least daily	Never
Telephone	53.2%	1.3%
Social Networks	45.1%	19.6%
Email	43.4%	2.9%
SMS	35.2%	5.1%
Instant Messenger & Messenger Apps	24.3%	34.8%
Location-Based Services	9.6%	60.9%
Forums	5.8%	44.4%
Video Telephony	5.3%	49.2%
Letters/Postcards	3.4%	18.5%
Microblogging Services	2.9%	77.6%

Question: How often do you use the following media for private communication?
Figure 27: Ranking of communication channels for private communication.

Many developments are being triggered by the increasing popularity of smartphones. For example, the distribution of smartphones has helped messenger services to gain wide acceptance. As a result, almost every fourth consumer (24.3 %) uses messengers on a daily basis. The distribution of location-based services (which provide users with information about their immediate vicinity) is also of interest. Although the majority of consumers (60.9 %) have not used such offers, every fourth (9.6 %) who has tried them uses them every day.

6.2 Heavy Versus Low Social Media Users

How do communication habits differ among consumer types? For our study, we compared the top and bottom 20 % of social media users (ranked by Social Media Index) concerning their overall communication behavior. Figure 28 displays the ten most frequently used means of communication of the top 20 % of social media users in our sample and compares them to the communication habits of the 20 % least active social media users.

Means of communication...	Top 20% SMI		Activity Difference Factor
	Usage at least daily	Usage at least daily	
Social Networks	75.5%	1.2%	+62.9
Telephone	71.0%	49.7%	+1.4
Email	59.8%	34.7%	+1.7
SMS	53.8%	15.7%	+3.4
Instant Messenger & Messenger Apps	45.3%	5.2%	+8.7
Location-Based Services	25.7%	0.4%	+64.3
Communication in Foto- & Video-Communities	20.7%	1.7%	+12.2
Video Telephony	14.1%	1.5%	+9.4
Forums	13.5%	4.6%	+2.9
Communication in Games & Virtual Worlds	12.8%	0.4%	+32.0



Question: How often do you use the following media for private communication?
Figure 28: Different communication habits of top and bottom 20 % of social media users, ranked by Social Media Index.

The figure shows that heavy social media users are again distinct from other consumers. They have different communication patterns with respect to all means of communication. The most interesting finding is that without exception, they use all communication channels far more often than other consumers. Their overall communication activity across all 13 measured means of communication is 8.5 times higher than the activity of low social media users. Compared to the sample average, the top 20 % social media users communicate 2.2 times more often. Not surprisingly, social networks are the most important communication tool for the top 20 % of social media users, followed by the telephone. Every fourth also uses location-based services (25.7 %). 12.8 % of the top 20 % of social media users are highly involved in gaming and use ingame communication tools.

6.3 Private Versus Business Use of Social Media

The communication habits of our respondents differ strongly with respect to private and professional environments (Figure 29). Telephone and email are popular in both worlds, but all other means of communication are used very differently in the two environments. As a general tendency, considerable skepticism towards modern communication tools can be observed for business communication. Only 7.1 % of respondents use social networks in their professional lives on a daily basis, and only 5.5 % of them employ messenger services. The same difference is found for other modern communication means. Forums, location-based services, video telephony, or microblogging are all currently used professionally by less than three percent of German employees on a daily basis.

Means of communication...	Private		Business	
	Usage ... at least daily	Usage ... at least daily	Usage ... at least daily	Usage ... never
Telephone	53.2%	41.7%	18.7%	
Social Networks	45.1%	7.1%	66.2%	
Email	43.4%	35.0%	26.2%	
SMS	35.2%	6.7%	52.6%	
Instant Messenger & Messenger Apps	26.3%	5.5%	75.7%	
Location-Based Services	9.6%	2.5%	85.7%	
Forums	5.8%	2.1%	78.0%	
Video Telephony	5.3%	2.8%	81.0%	
Letters/Postcards	3.4%	9.7%	44.4%	
Microblogging Services	2.9%	1.0%	88.8%	

Question: How often do you use the following media for private / business communication?
Figure 29: The differential use of communication means in private versus business environments.

These findings raise interesting questions about the reasons for these differences between private and business communication patterns. We believe two causes are mainly responsible:

Firstly, communication requirements in a business environment are different from those in private settings. This is true for internal and external communication alike. The market for company-specific internal social networks is still relatively young and the options for specialized communication software still limited. Some larger German companies have started to build their own corporate social networks. However, most German enterprises, especially medium-sized ones, have not entered this area at all yet. Looking at external communication, many firms fear unqualified statements of their employees both toward the public and toward their customers. To reduce this risk, the development of social media guidelines and social media training has become popular. This development, though, is still in its infancy in Germany. In a recent study by Armutat, Geighardt-Knollmann & Steinhäuser (2012), 66 % of German firms had no social media guidelines, and 85 % had not yet offered social media training for their employees.

Secondly, companies also tend to be slow and riskaverse when it comes to restructuring internal processes. This might especially be true for modern means of communication. Other studies have shown that in 2012, 72 % of German companies still restricted social media for their employees somehow, and 9 % of firms even block all social media applications for all employees.¹⁴ These figures are in line with the results of our study and explain why 66.2 % of employees have never used social networks and 75.7 % have never utilized messenger services in their professional lives.

¹⁴ Statista (2012c).

7 CONCLUSION

For 2013, many bloggers have predicted the long-awaited fusion of traditional and social media marketing departments, together with the professionalization of the brand experience via social media. Our data shows that this step is overdue. For consumers, social media are on the verge of commoditization. Whether for entertainment, communication, or consumption, this study provides evidence that social media are now used routinely in impressively many aspects of consumer lives. In the near future, the increasing distribution of smartphones will further accelerate this development and create many valuable applications for digital, social content in real-world contexts.



In contrast, the average German company does not yet seem to have completely adapted to this change. Using the pinball metaphor of social media marketing, most German companies still do not seem to have completely understood the new rules of the game. Valuable scores in the battle for the consumer favor are still "given away" because flippers, bumpers, and slingshots are not orchestrated well. From now on, brands need to manage traditional and social marketing channels jointly, not isolatedly. Our analysis of the top 20 % of social media users provided a look into future consumer behavior. Already today, many consumers more equally incorporate information from different sources, for decision making and are frustrated if they cannot find value. As this consumer segment is likely to grow, it will become more expensive for companies to underuse social media channels. Marketing needs integrated communication strategies for new and old communication channels to fully adapt to these new circumstances.

Furthermore, for many companies, it will be worth reconsidering and adjusting CRM-concepts and sales strategies to extend the integration process beyond marketing as a communication task. Progressive companies will even go one step further and substantially restructure internal communication processes. They will exploit the potential offered by more efficient means of communication and collaboration which social media enable – and some will even allow their employees to use social media on their job ...

These are times of rapid change in which many exciting developments are in store!

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Wie gestaltet Ihr Unternehmen den Zugang zu Social Media während der Arbeitszeit?
Data from DGFP, <http://de.statista.com/statistik/daten/studie/151454/umfrage/moeglichkeit-der-nutzung-von-social-media-waehrend-der-arbeitszeit/>, page visit from December 28, 2012.

9 APPENDIX: INDUSTRY-SPECIFIC MEDIA USAGE RESULTS

On the following pages, we list the industry-specific results from our study concerning purchase decision influence factors and brand relationships.

9.1 Product Industries

Overall Results

Number of cases in sample: 1,125 | Average industry involvement: 3.75

Purchase Decision Influence Factors



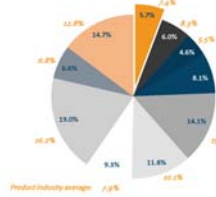
Brand Relationship Influence Factors



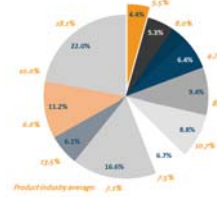
Hardware Store Products

Number of cases in sample: 114 | Average industry involvement: 3.66

Purchase Decision Influence Factors



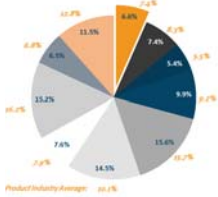
Brand Relationship Influence Factors



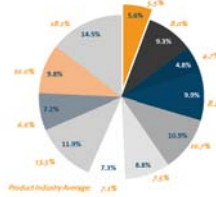
Automotive & Private transportation (bikes, motorcycles, etc.)

Number of cases in sample: 126 | Average industry involvement: 4.83

Purchase Decision Influence Factors



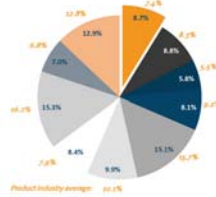
Brand Relationship Influence Factors



Home Appliance Industry

Number of cases in sample: 127 | Average industry involvement: 4.23

Purchase Decision Influence Factors



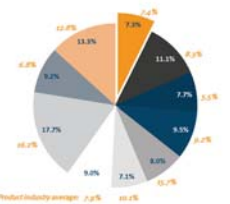
Brand Relationship Influence Factors



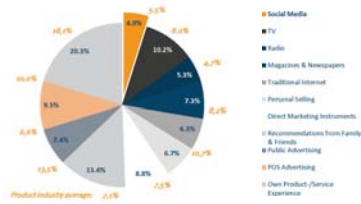
Grocery Industry

Number of cases in sample: 119 | Average industry involvement: 2.42

Purchase Decision Influence Factors



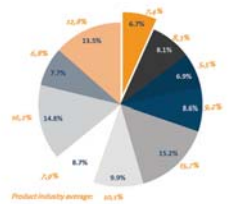
Brand Relationship Influence Factors



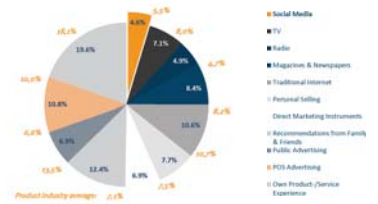
Apparel Industry

Number of cases in sample: 120 | Average industry involvement: 3.32

Purchase Decision Influence Factors



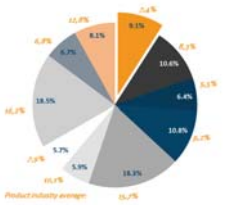
Brand Relationship Influence Factors



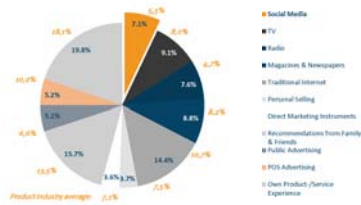
Media Industry (books, movies, music, games, etc.)

Number of cases in sample: 134 | Average industry involvement: 2.88

Purchase Decision Influence Factors



Brand Relationship Influence Factors



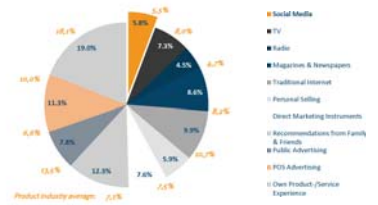
Sport Goods & Leisure Wear Products

Number of cases in sample: 129 | Average industry involvement: 3.76

Purchase Decision Influence Factors



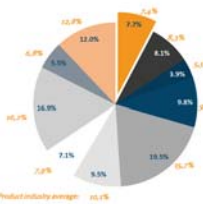
Brand Relationship Influence Factors



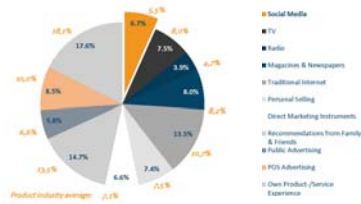
Entertainment Electronics Industry

Number of cases in sample: 128 | Average industry involvement: 4.57

Purchase Decision Influence Factors



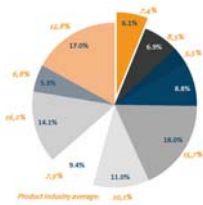
Brand Relationship Influence Factors



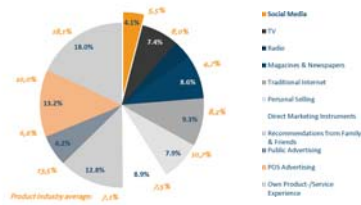
Furniture & Home Decoration Products

Number of cases in sample: 127 | Average industry involvement: 4.05

Purchase Decision Influence Factors



Brand Relationship Influence Factors

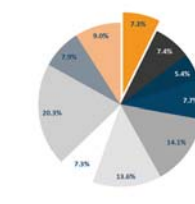


9.2 Service Industries

Overall Results

Number of cases in sample: 1,073 | Average industry involvement: 3.82

Media Importance for Service Purchase Decisions



Brand Relationship Influence Factors



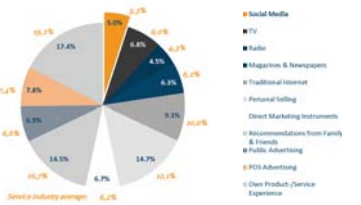
Banking & Insurance Industry

Number of cases in sample: 135 | Average industry involvement: 4.34

Purchase Decision Influence Factors



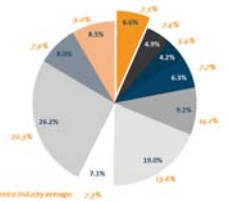
Brand Relationship Influence Factors



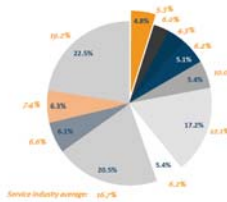
Small Business (barbers, craftsmen, bakeries, etc.)

Number of cases in sample: 126 | Average industry involvement: 3.49

Purchase Decision Influence Factors



Brand Relationship Influence Factors

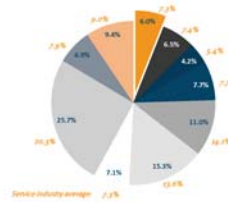


- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

Health Care

Number of cases in sample: 136 | Average industry involvement: 4.08

Purchase Decision Influence Factors



Brand Relationship Influence Factors

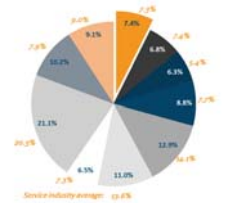


- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

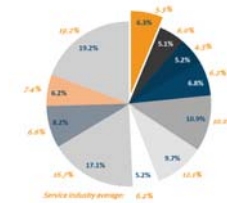
Recreational Services (entertainment parks, cinemas, gyms, etc.)

Number of cases in sample: 135 | Average industry involvement: 3.38

Purchase Decision Influence Factors



Brand Relationship Influence Factors

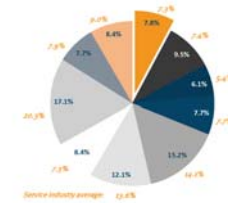


- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

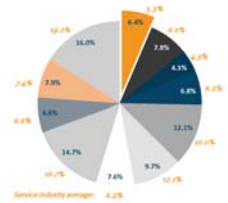
Communication Services

Number of cases in sample: 147 | Average industry involvement: 4.38

Purchase Decision Influence Factors



Brand Relationship Influence Factors



- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

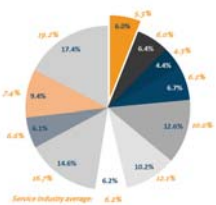
Travel Industry (providers, airlines, hotels, etc.)

Number of cases in sample: 127 | Average industry involvement: 3.66

Purchase Decision Influence Factors



Brand Relationship Influence Factors



- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

Public Utility Services

Number of cases in sample: 130 | Average industry involvement: 4.35

Purchase Decision Influence Factors



Brand Relationship Influence Factors

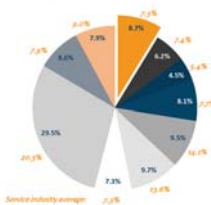


- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

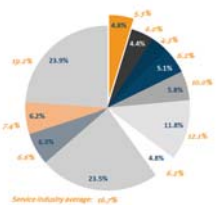
Restaurant Industry

Number of cases in sample: 137 | Average industry involvement: 2.83

Purchase Decision Influence Factors



Brand Relationship Influence Factors



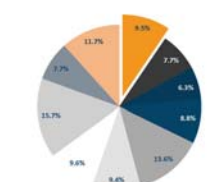
- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

9.3 Retailing Industries

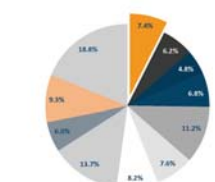
Overall Results

Number of cases in sample: 276 | Average industry involvement: 3.20

Media Importance for Service Purchase Decisions



Brand Relationship Influence Factors

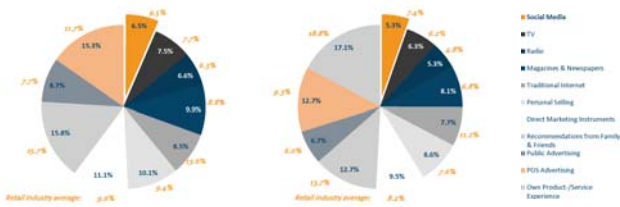


- Social Media
- TV
- Radio
- Magazines & Newspapers
- Traditional Internet
- Personal Selling
- Direct Marketing Instruments
- Recommendations from Family & Friends
- Public Advertising
- PDS Advertising
- Own Product/Service Experience

Offline Retailing

Number of cases in sample: 133 | Average industry involvement: 2.83

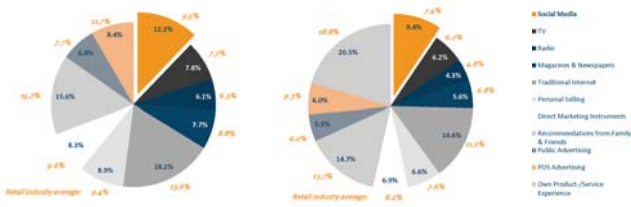
Media Importance for Service Purchase Decisions Brand Relationship Influence Factors



Online Retailing

Number of cases in sample: 143 | Average industry involvement: 4.35

Media Importance for Service Purchase Decisions Brand Relationship Influence Factors



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