The Ello social media network: Identifying the Joiners, Aspirers, and Detractors

November 2014 Insight Report using our DeepProfile™ capabilities

About this Insight Report

- This report highlights consumers' intent regarding the **new social media network, Ello**, which has received significant buzz for its publicized commitment to not use members' data for commercial purposes, such as ad targeting, re-selling to third parties, etc. By grouping respondents by their stated intent about joining Ello, the report also provides deeper insights into their personas.

- The data includes **39,729 respondents** from October 1-November 1, 2014.

- CivicScience developed this report using our **InsightStore™** solution – an online research platform that mines real-time consumer opinions and custom research responses from over **28 million+ anonymous respondent profiles**.

- An overview of our **methodology** is available at the end of this report.

biz.civicscience.com

CIVIC SCIENCE

Topline Results

Our question:
"Have you received or requested an invitation to join Ello, the new anti-ad social media network competitor to Facebook?"

> All respondents responding between 10/1/2014 and 11/2/2014
> Weighted according to U.S. Census figures for gender and age, 13 and older

Yes, and I've already joined	793	2%
Yes, and I plan to join soon	645	2%
Yes, and I don't plan to join	483	1%
No, but I want one	4,551	11%
No, and I'm not interested	33,257	84%

Margin +/- 1%   39,729 responses from 10/01/2014 to 11/01/2014

Generated by CivicScience ® on Nov 6, 2014 at 15:47:30 EST

(Note: Unweighted results were nearly identical in response breakdowns.)

CIVIC SCIENCE

We grouped the respondents into 3 segments:

Have you received or requested an invitation to join Ello, the new anti-ad social media network competitor to Facebook?

> All respondents responding between 10/1/2014 and 11/2/2014
> Weighted according to U.S. Census figures for gender and age, 13 and older

Yes, and I've already joined	2%	"Joiners"
Yes, and I plan to join soon	2%	"Joiners"
Yes, and I don't plan to join	1%	"Detractors"
No, but I want one	11%	"Aspirers"
No, and I'm not interested	84%	"Detractors"

Margin +/- 1%   39,729 responses from 10/01/2014 to 11/01/2014

Because Ello is still currently invitation only to join, we grouped those who answered "Yes, and I plan to join soon" in with those who have already joined, since their membership is likely imminent. Aspirers have not yet received an invitation, but are interested in joining.

CIVIC
SCIENCE

We used the CivicScience DeepProfile™ for this report.

Goal: To surface meaningful insights by comparing **3 segments** of people:

- ✓ Those who have joined or are about to join Ello ("**joiners**")

- ✓ Those who want to join ("**aspirers**")

- ✓ Those who don't want to join ("**detractors**")

and how they compare to the **general U.S. population**.

Summary of Findings: Personas

- **Ello joiners** overall are younger in age who are pre-college graduates, and therefore have lower incomes and are not yet parents. However, they also include a healthy mix of higher-income, well-educated adults. Joiners are more urban that aspirers and detractors. They rank extremely high in our indices for market mavens, social media engagement (although they under-index in Facebook usage), and TV viewing, but are also strong in money management. They rank higher than the other groups in their price sensitivity and discriminating shopping practices, but are least likely to be influenced by TV ads vs. Internet ads or social media. Ironically, they are far less concerned about data privacy issues than the other groups.

- **Ello aspirers** are slightly more male, generally college-educated, middle-class, suburban adults who peak among those aged 35-44. Ranking behind the joiners, they still index higher than the general population in market maven and social media attributes. They are most addicted to their digital devices of the 3 groups. They are less price sensitive than the other groups and the general population, but they do tend to frequently price compare and showroom across websites. They rank highest in frequent Facebook use, but like YouTube too.

- **Ello detractors** tend to be over age 45, be either a parent or grandparent, and live in suburban or rural areas. They index below the other groups and the general population in market maven, social media, and tech savvy attributes. They are more influenced by ads on TV vs. Internet ads and social media. They are less price sensitive and less discriminating in their shopping.

# Demographics

Please indicate your gender
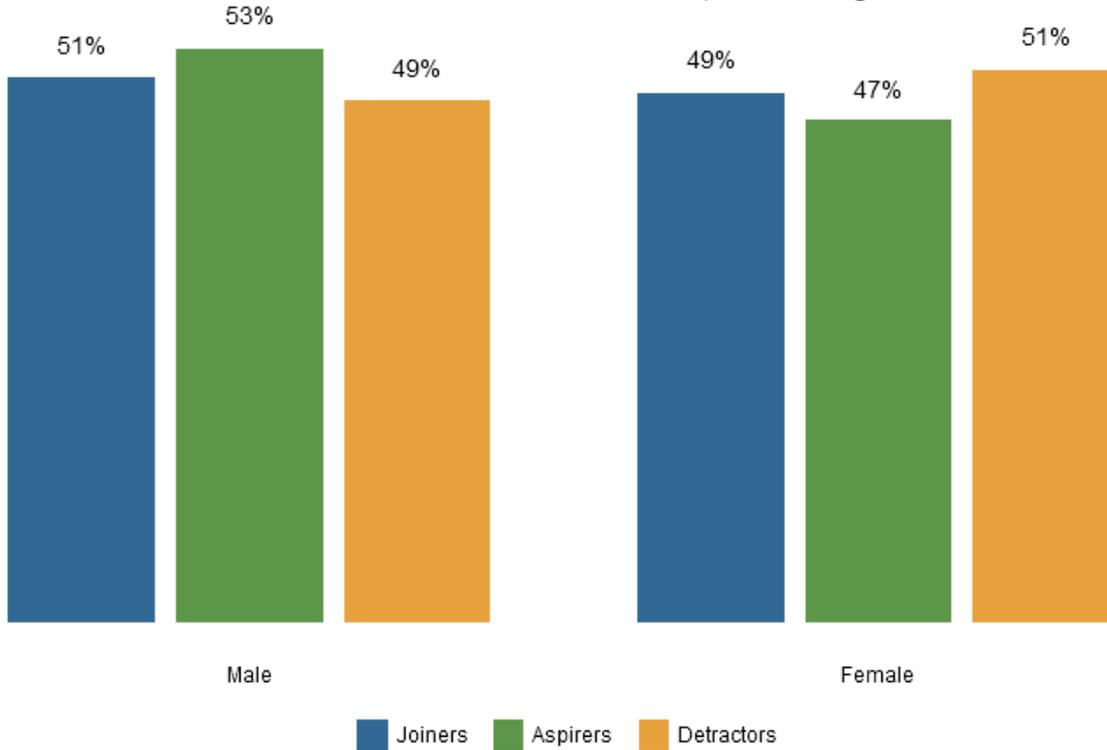
Ello aspirers are somewhat more likely to be men than women. Joiners and detractors are fairly evenly split in gender distribution.

# To what broad age group do you belong?
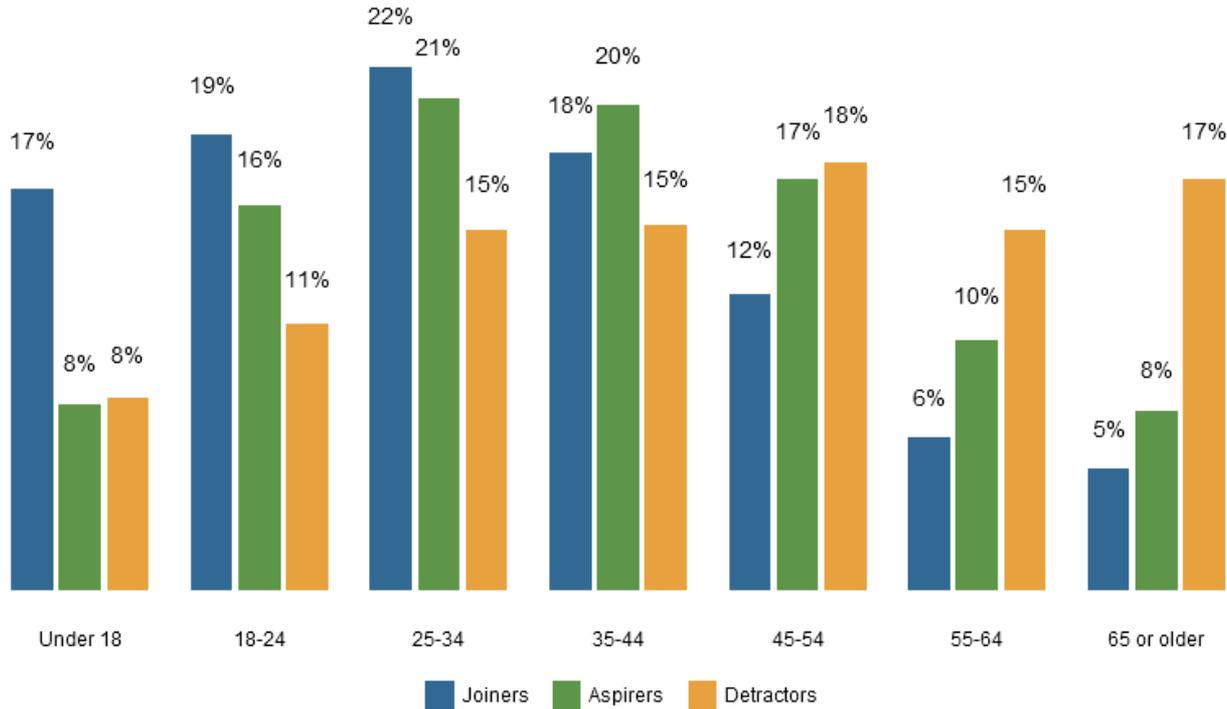
Perhaps predictably, Ello joiners are more likely to be 34 years old under, while detractors are more likely to be in older age groups. Aspirers peak among those aged 25-44.

# What is your expected annual household income before taxes?
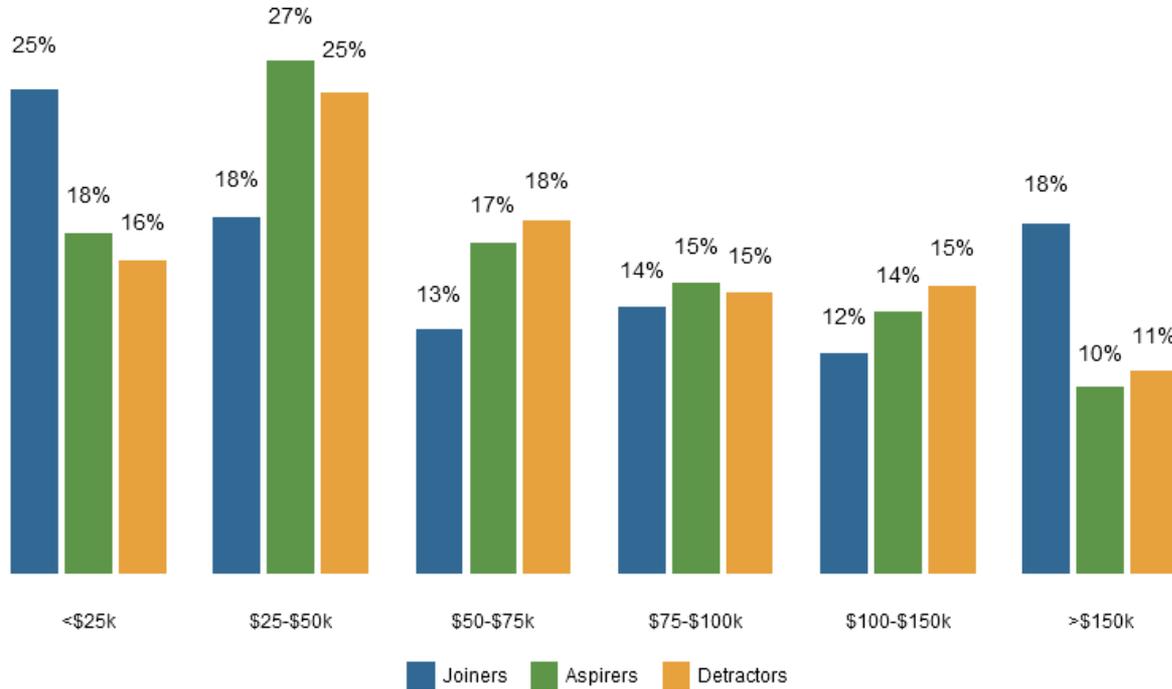
Ello joiners are more likely to be on the lowest (age is a big factor here) and highest ends of the income spectrum. Aspirers peak among those making $25K-$50K per year, as do detractors.

What is the highest level of education you have attained?
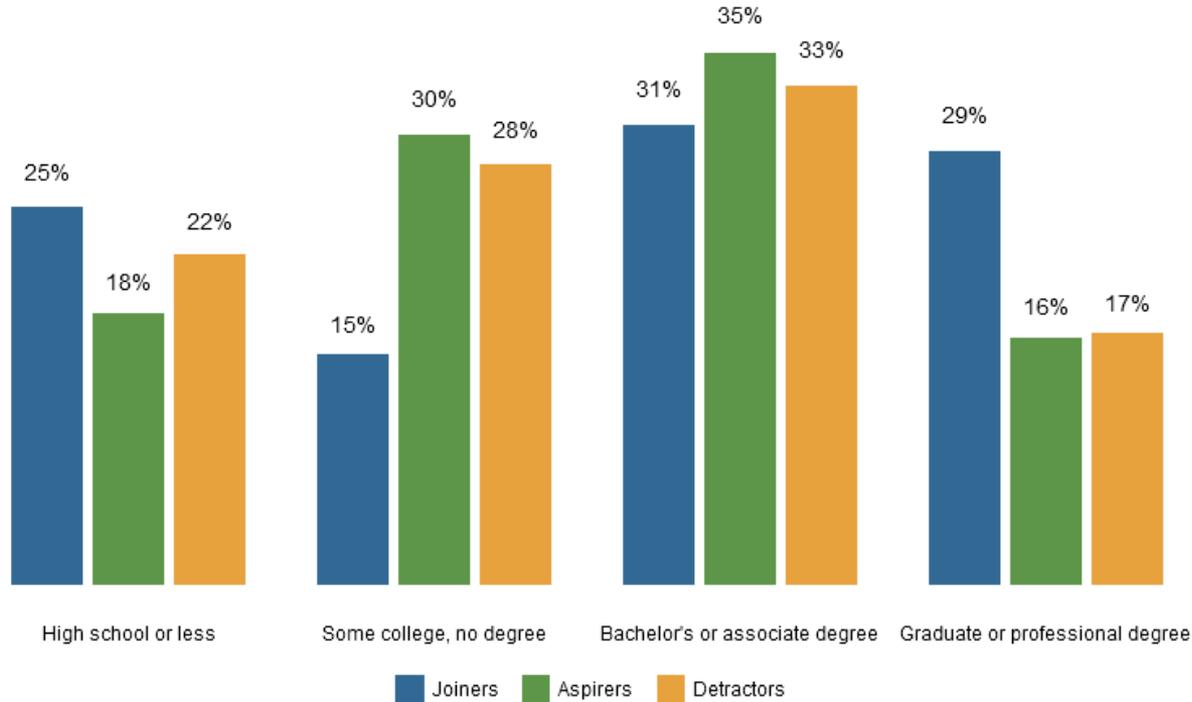
Consistent with the age and income demographic data, we see that Ello joiners are more likely than the other groups to have a high school education or advanced/graduate degrees.

What is your parental status?
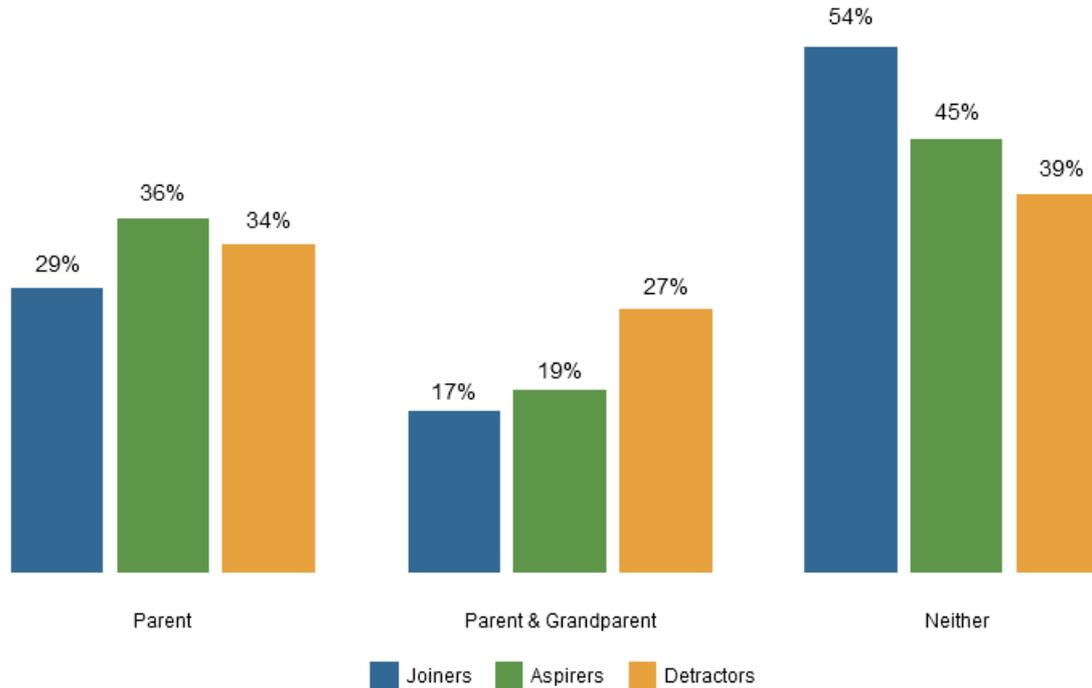
Also consistent with the age proxy, the majority (54%) of Ello joiners are not yet parents, while the majority of detractors are a parent and/or grandparent (61%).

What type of area do you live in?
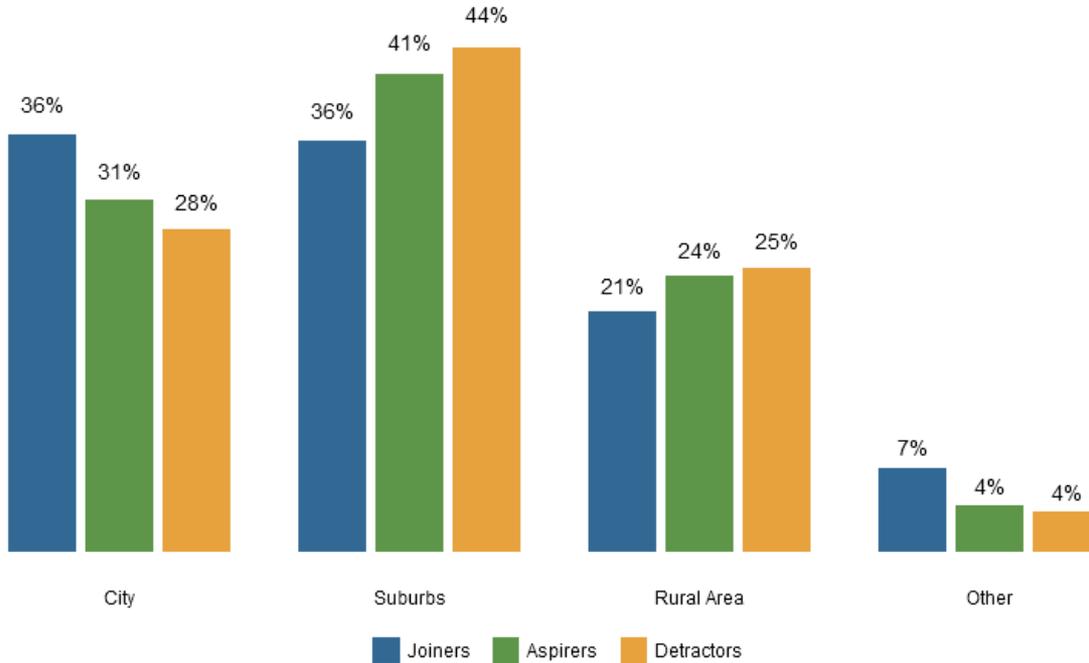
Ello joiners are more urban than the other two segments.

CivicScience DeepProfile™ Indices

How these 39,729 respondents also answered hundreds of other
CivicScience questions over time, compared to the general U.S. population.

DeepProfile™ Indices

In the following slides, we examine how *Ello joiners*, *Ello aspirers*, and *Ello detractors* compare based on how the segments responded to a number of questions that contribute to CivicScience's DeepProfle™ indices. The visualizations on the following pages show relative differences to the general population. In this report, we look at 7 of our 12 indices: **Market Maven, Social Media, Tech Savvy, TV Viewing, Money Manager, Price Sensitivity, and Discriminating Shopper**.
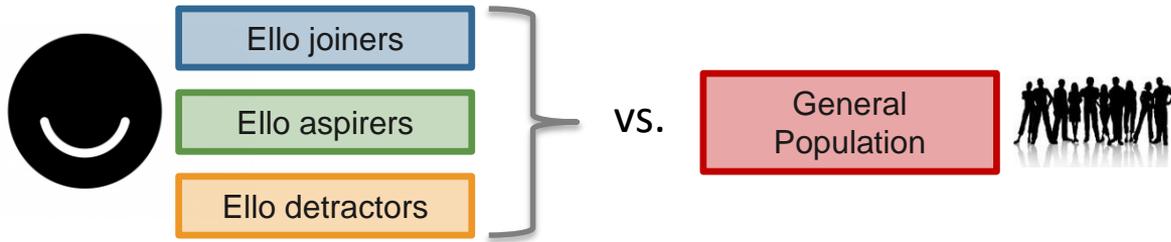
Ello joiners

Ello aspirers

Ello detractors

vs.

General Population

CIVIC SCIENCE

Market Maven

- The Market Maven index aims to identify the extent to which population segments adopt new products and brands, and share their opinions with others.
- Those who've already joined Ello rank remarkably high on our Market Maven index, particularly in seeing themselves as fashion leaders. Aspirers also rank higher than the general population.

Aggregate:
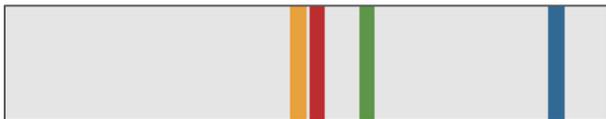
Joiners – 185
Aspirers – 118
General Population – 100
Detractors – 93

Individual Attributes Visualization

Market Maven Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
Fashion leader	**53%**	12%	10%
Follows fashion trends	**64%**	38%	35%
Follows music trends	**73%**	39%	32%
Tries new products before others	**52%**	36%	24%
Tells others about new products	**66%**	62%	42%
Tells others about favorite products	37%	**64%**	54%
Writes positive product reviews	48%	**66%**	55%
Writes negative product reviews	**62%**	58%	43%

- **Ello joiners** rank higher than the other groups in areas related to fashion and music trends, early adoption of new products, and sharing info about new products. They are also more likely to write *negative* product reviews.
- Those who **aspire** to join Ello rank higher than all other segments in talking and writing *positively* about products they like.

CIVIC SCIENCE

Social Media

- The Social Media index aims to identify the extent to which social platforms influence their preferences and behavior.

- It should be no surprise that Ello's early joiners rank twice as high as the general population on our Social Media index, but aspirers also stand well apart from the general population.

Aggregate:
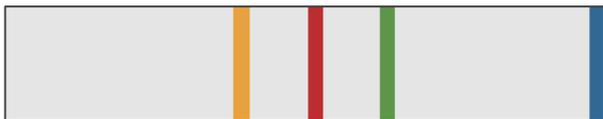
Joiners – 207
Aspirers – 127
General Population – 100
Detractors – 72

Individual Attributes Visualization

Social media influences music taste

Uses social media while watching TV

Social media influences purchases

Social media influences TV, movie taste

Joiners
Aspirers
Detractors
General Population
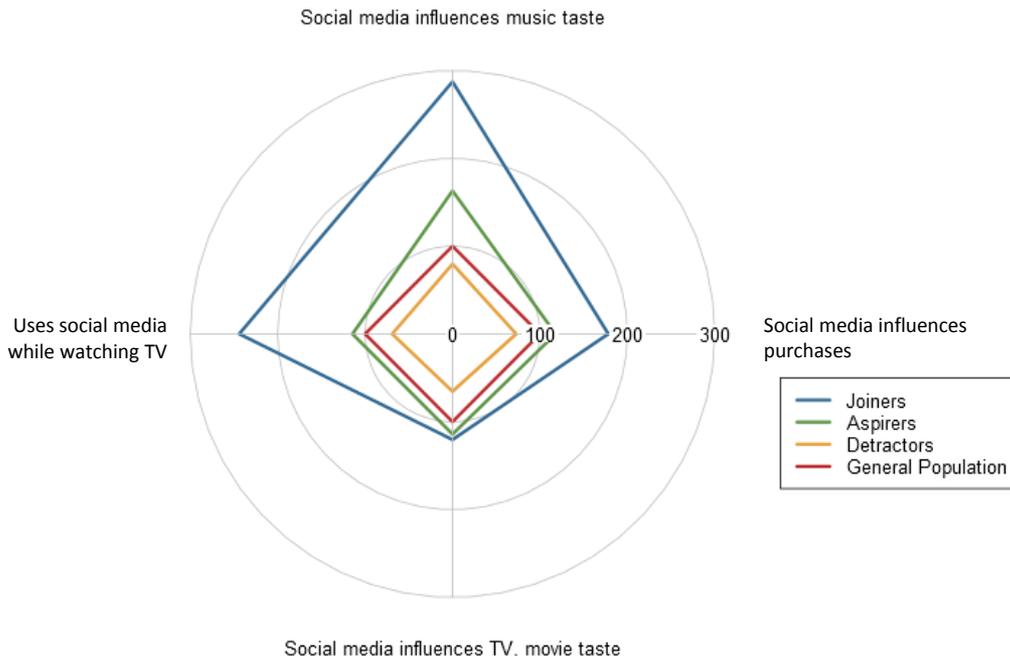
Social Media Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
Social media influences purchases	**60%**	40%	24%
Social media influences music taste	**61%**	34%	17%
Social media influences TV, movie taste	**50%**	48%	27%
Uses social media while watching TV	**37%**	17%	10%

Ello joiners stand out from the other segments when it comes to how influenced they are by social media, as well as in their use of social media when watching TV.

CIVIC
SCIENCE

Tech Savvy

- The Tech Savvy index aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.

- Ello joiners and those who aspire to join are neck-and-neck in their aggregate score on our Tech Savvy index. Meanwhile, detractors score far below the general population here.

Aggregate:

Aspirers – 107
Joiners – 107
General Population – 100
Detractors – 78

Individual Attributes Visualization
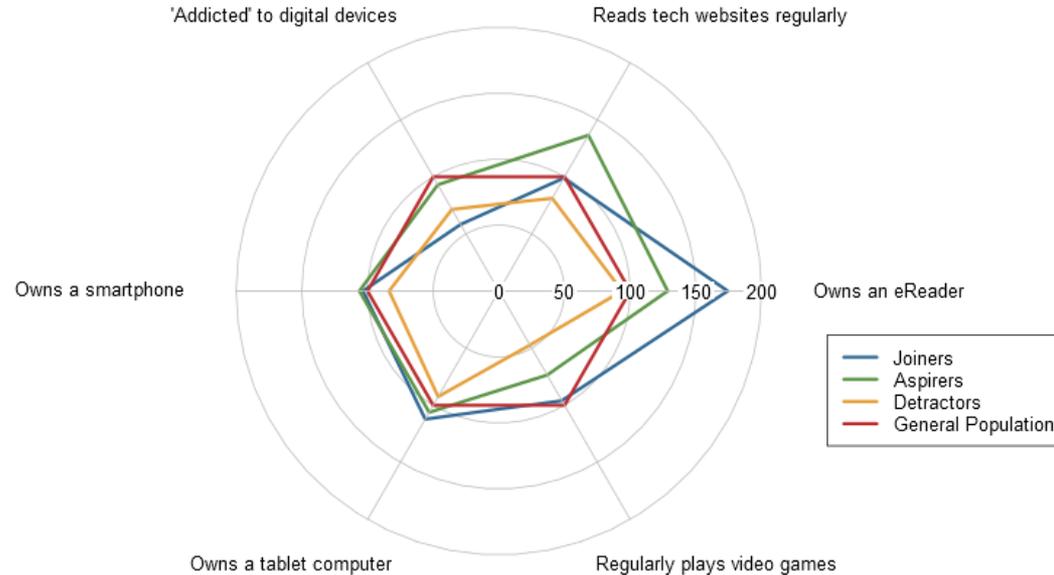
Tech Savvy Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
'Addicted' to digital devices	37%	**58%**	45%
Owns a smartphone	71%	**73%**	58%
Owns a tablet computer	**51%**	48%	42%
Owns an eReader	**51%**	37%	27%
Reads tech websites regularly	33%	**45%**	27%
Regularly plays video games	**43%**	33%	21%

- This is an interesting index, with some surprising findings (we think). The **Ello joiner** segment has the fewest calling themselves addicted to their digital devices, and **aspirers** are the most likely to say they are addicted.
- **Ello aspirers and joiners** are fairly close in their ownership of smartphones and tablet computers, despite the age and income differences we saw in the demographic splits.
- **Aspirers** are the most attentive to tech news and trends.
- **Ello joiners** have the highest percentage of those who regularly play video games.

CIVIC
SCIENCE

TV Viewing

- The TV Viewing index aims to identify the extent to which population segments watch various genres of TV and are influenced by what they see on TV.

- It's pretty clear: Ello joiners love their TV, scoring twice as high on our index than the general population. Aspirers and detractors look much more like the general population in the aggregate.

Aggregate:

Joiners – 201
Aspirers – 108
Detractors – 102
General Population – 100

Individual Attributes Visualization
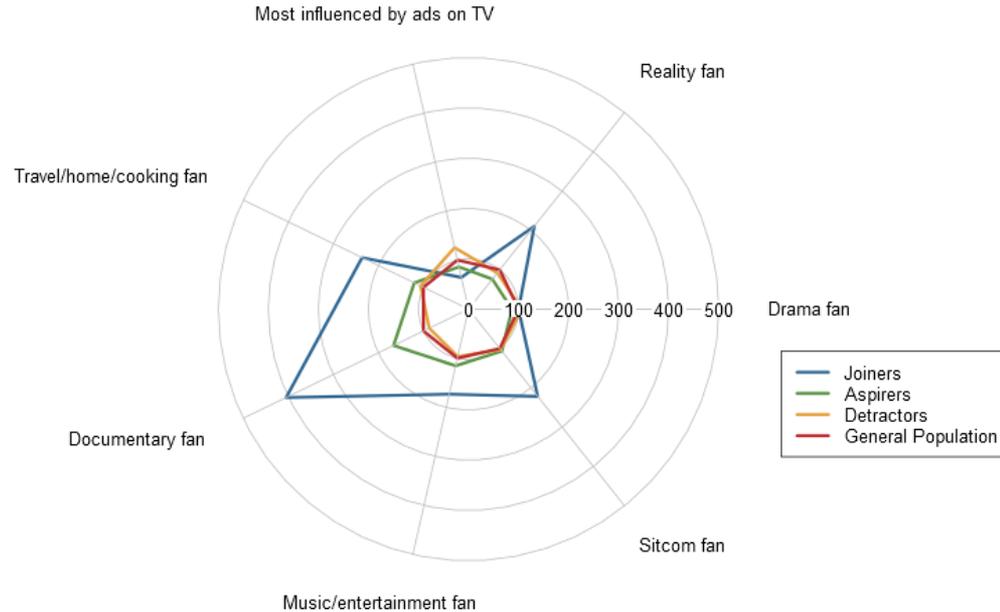
TV Viewing Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
Drama fan	16%	14%	17%
Sitcom fan	**30%**	14%	14%
Reality fan	**29%**	11%	13%
Documentary fan	**35%**	14%	8%
Travel/home/cooking fan	**26%**	13%	12%
Music/entertainment fan	**47%**	31%	26%
Most influenced by ads on TV	29%	39%	**56%**

- **Ello joiners** overall are bigger fans of nearly every TV genre when compared to the other segments and to the general population – particularly when it comes to documentaries and sitcoms. They are far less likely to say that TV ads influence them the most (compared to Internet ads and social media).
- **Ello detractors** are far more likely than the other segments to say they are most influenced by ads on TV – this is a consistent characteristic that CivicScience sees in any segments we study with a sizable population of ages 45+.

CIVIC
SCIENCE

Money Manager

- The Money Manager index aims to show the differences in how well personal finances are handled and the level of attention to economic trends.

- Ello joiners seem to do very well compared to the general population when it comes to savings and following economic news. Detractors rank a little higher than aspirers and the general population.

Aggregate:

Joiners – 135
Detractors – 108
Aspirers – 100
General Population – 100

Individual Attributes Visualization
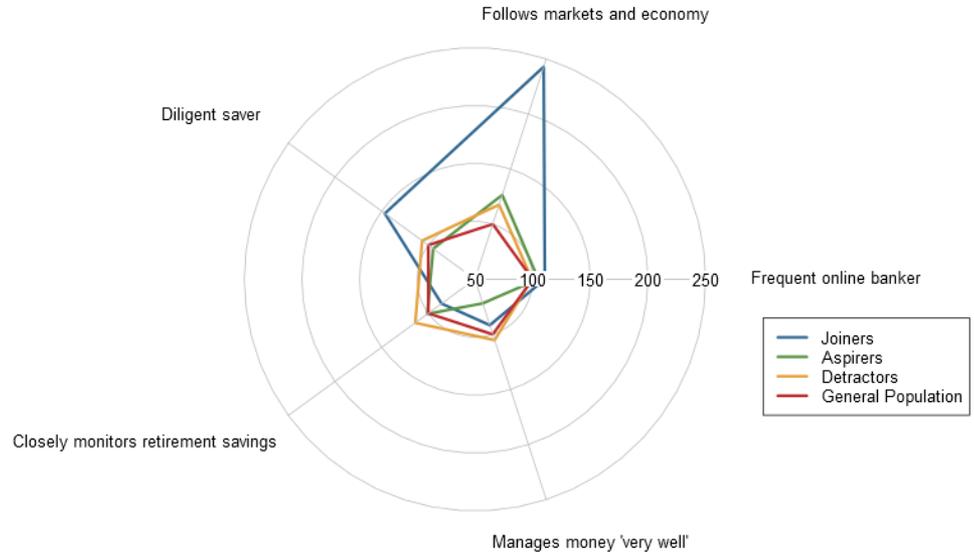
Money Manager Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
Frequent online banker	**49%**	47%	44%
Follows markets and economy	**36%**	19%	17%
Diligent saver	**62%**	40%	45%
Closely monitors retirement savings	33%	39%	**44%**
Manages money 'very well'	18%	14%	**20%**

- **Ello joiners**, despite their overall younger age and lower incomes, rank higher than the other groups when it comes to online banking activity, saving their money, and following the markets and economy. But keep in mind, this segment also captured a sizable portion of those making over $150K per year in household income.
- **Aspirers** rank the lowest in self-characterizing that they manage their money "very well."
- **Detractors**, which tend to be older in age, rank highest when it comes to closely monitoring their retirement savings.

CIVIC SCIENCE

Price Sensitivity

- The Price Sensitivity index aims to identify how price-conscious respondents are based on a mix of sentiment and behaviors.

- Perhaps due to their age and income, Ello joiners in aggregate also rate highest here. Ello aspirers and detractors are both less price sensitive than the general population.

Aggregate:

Joiners – 140
General Population – 100
Detractors – 93
Aspirers – 83

Individual Attributes Visualization

biz.civicscience.com
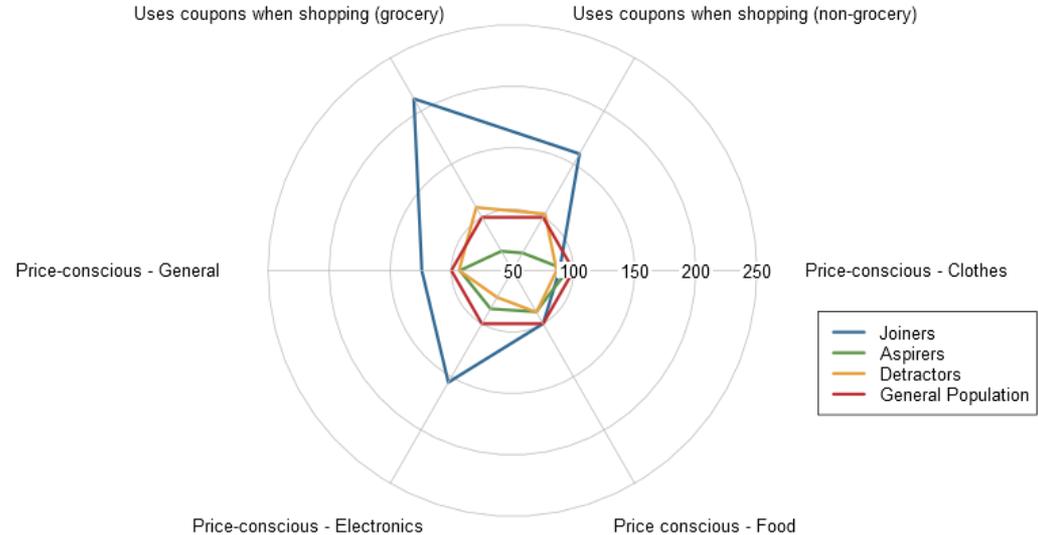
Price Sensitivity Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
Uses coupons when shopping (non-grocery)	**35%**	14%	22%
Uses coupons when shopping (grocery)	**50%**	16%	26%
Price-conscious - General	**53%**	40%	40%
Price-conscious - Electronics	**46%**	26%	22%
Price conscious - Food	**38%**	34%	34%
Price-conscious - Clothes	48%	**52%**	47%

- **Ello joiners** are more likely to be couponers than the other segments (particularly compared to aspirers). They are also more price conscious in general and in the category of electronics. Their attributes on this index are likely due to their aggregate younger age and lower income.
- **Ello aspirers** are more likely to be price conscious in the category of clothing than the other segments.

CIVIC SCIENCE

Discriminating Shopper

- The Discriminating Shopper index aims to identify the extent to which population segments do research before making purchases, and how easy or difficult they will be to win over.

- Ello joiners also rank the highest here, with detractors being the least discriminating on this index in aggregate.

Aggregate:

Joiners – 137
General Population – 100
Aspirers – 98
Detractors – 88

Individual Attributes Visualization

CIVIC
SCIENCE
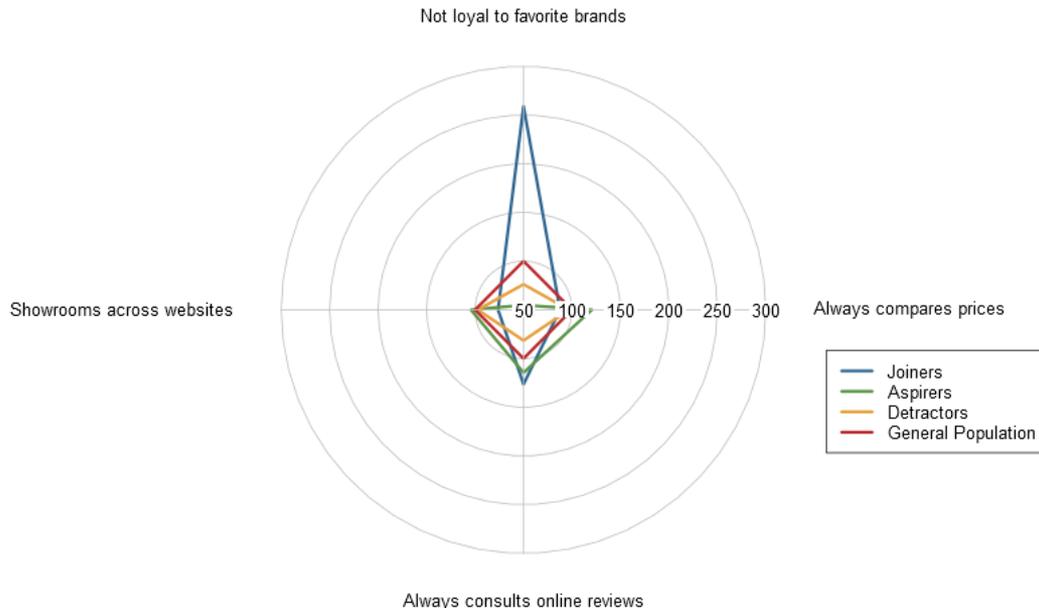
Discriminating Shopper Index (continued)

Individual Attributes

Attribute	Joiners	Aspirers	Detractors
Always compares prices	41%	**56%**	45%
Not loyal to favorite brands	**39%**	8%	12%
Showrooms across websites	52%	**71%**	66%
Always consults online reviews	**38%**	35%	25%

- **Ello joiners** are much more likely than the other segments to be disloyal to brands. They also tend to consult online reviews.
- Those who **aspire** to join Ello index higher in price-comparison behavior and showrooming across different websites.

CIVIC
SCIENCE

Additional Insights

Ello and Data Privacy Sentiment

Early joiners of Ello may be doing so less for the company's "manifesto" about handling of users' data than for its "new" factor. Joiners overall are less concerned about privacy issues, which is consistent with sentiment we see in younger adults in the general population. (See our recent two-part report on Data Privacy sentiment.)

Attribute	Joiners	Aspirers	Detractors
"Very concerned" about own privacy while using the Internet	35%	50%	50%
"Not concerned at all" about own privacy while using the Internet	**24%**	6%	7%
"Strongly believe" that companies should never sell the personal information from their customers to other companies	45%	76%	**84%**
"Strongly believe" that companies seeking personal information online should disclose ALL the ways the data is collected and used	52%	**90%**	82%

CIVIC SCIENCE

Ello and Use of Other Social Sites

Ello joiners are less actively engaged in Facebook than aspirers, but much more engaged in Instagram and Pinterest. Ello joiners and aspirers are both more frequent users of YouTube compared to detractors.

Attribute	Joiners	Aspirers	Detractors
Daily or weekly Facebook use	49%	**67%**	47%
Daily or weekly Twitter use	21%	20%	14%
Daily or weekly Instagram use	**48%**	17%	11%
Daily or weekly Pinterest use	**31%**	14%	10%
Daily or weekly YouTube use	67%	**69%**	50%

CIVIC SCIENCE

Behavioral and Sentiment Insights

Below lists an assortment of other behavioral and sentiment areas where Ello joiners index higher than the other two groups.

Attribute	Joiners	Aspirers	Detractors
Shares celebrity gossip / news via social media every day.	**22%**	7%	3%
Shares sports news via social media every day	**21%**	6%	3%
Has used and loves SnapChat	**32%**	5%	6%
Buys organic food at every chance	**37%**	12%	8%
Self-reports they are more physically attractive than most people their age and gender	**38%**	10%	9%
Saves at least 20% of income each month on average, including for retirement savings	**41%**	7%	11%

CIVIC SCIENCE

Brand and Celebrity Fandom

We also track many brands and celebrities to show how they rank among customized segments. Below you can see some who index higher among Ello joiners compared to the other two segments.

Brand / Celebrity	Joiners	Aspirers	Detractors
Bruno Mars ("I love him")	**39%**	9%	5%
Instagram ("I love it")	**37%**	20%	12%
Seth Rogan ("I love him")	**34%**	16%	7%
Ross stores ("I love it")	**26%**	6%	5%
Gary Busy ("I love him")	**24%**	6%	3%
Subaru cars ("I love them")	**23%**	8%	7%
Mazda cars ("I love them")	**21%**	5%	4%

CIVIC SCIENCE

Appendix Slides

The CivicScience DeepProfile™ Indices

- **Charitable Giving**- The Charitable Giving index aims to identify the extent to which population segments donate to different charity groups, and how much time they spend volunteering.

- **Discriminating Shopper**- The Discriminating Shopper index aims to identify the extent to which population segments do research before making purchases, and how easy or difficult they will be to win over.

- **Environmental Consciousness**- The Environmental Consciousness index aims to identify the extent to which population segments alter their lifestyle for the environment and shows overall concern about environmental issues.

- **Health & Wellness**- The Health & Wellness index aims to identify the extent to which population segments monitor and maintain their health and wellbeing.

- **Market Maven**- The Market Maven index aims to identify the extent to which population segments adopt new products and brands, and share their opinions with others.

- **Money Manager** – The Money Manager index aims to identify the extent to which population segments manage their personal finances including retail, online, and mobile banking practices; retirement and savings; and keeping up with financial news.

- **Political Engagement**- The Political Engagement index aims to identify the extent to which population segments are involved in all levels of politics.

- **Price Sensitivity**- The Price Sensitivity index aims to identify the extent to which population segments are price-conscious when shopping, both as a whole and across specific categories.

- **Social Media**- The Social Media index aims to identify which social media platforms population segments use, and the extent to which they influence their preferences and behavior.

- **Sports Fan**- The Sports Fan index aims to identify the extent to which population segments are interested in different types of sports.

- **Tech Savvy**- The Tech Savvy index aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.

- **TV Viewing**- The TV Viewing index aims to identify the extent to which population segments watch various genres of TV and are influenced by what they see on TV.

CIVIC SCIENCE

Methodology

About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents answer just for fun, are 100% voluntary opt-ins, and are kept anonymous, allowing for greatly reduced bias and higher levels of engagement. Using technology, CivicScience builds deep psychographic profiles of these anonymous respondents over time, providing valuable consumer sentiment data to the decision makers who care. Automated data science technology allows clients to rapidly gain robust consumer insight and trending reports. The CivicScience methodology has been scientifically validated by a team of academic leaders and by independent consulting firms. Responses may be weighted for U.S. census representativeness for gender and age. CivicScience currently has more than 28 million anonymous consumer profiles and 600 million responses stored, growing daily.

CIVIC SCIENCE

CivicScience DeepProfile™ - How it Works

For the segments we're interested in, we look at how those people responded to **thousands of other questions** in our database, building a contingency table for each pair of questions.

We automatically mine thousands of questions related to our 12 DeepProfile™ indices, plus demographic and behavioral attributes such as:

- **Lifestyle**
- **Media consumption**
- **Entertainment**
- **Technology usage**
- **Health and wellness**
- **Politics and ideology**
- **Other general attributes**

We calculate each table's **Pearson's chi-squared** statistic, and then employ the **Benjamini-Hochberg false detection rate** procedure to screen out likely false positives (i.e., statistically-significant associations that may be due to random chance).

The tables that pass through our screening process are then ranked by their **Tschuprow's T coefficient**, which measures strength of association.

CIVIC SCIENCE

The CivicScience InsightStore™

The leading intelligent polling and **real-time consumer insights** platform. Runs on the largest **proprietary**, syndicated, and independent consumer survey database. Supports a variety of consumer research solutions, including our DeepProfile™.
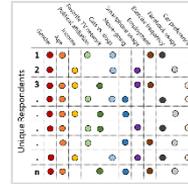
Dynamic
Question
Library

Publisher
Audience
Network

Correlation
Discovery
Engine

Real-Time
Insights
Solutions

CIVIC SCIENCE

Contact us to discuss a tailored CivicScience DeepProfile™ Report, InsightStore™ Subscription, and Custom Research for your brand:

contact@civicscience.com

Thank you.

contact@civicscience.com
Follow us on Twitter @civicscience