

WHO'S IN THE CLUB? A FIRST LOOK AT THE CLUBHOUSE APP

March 2021

Play

SignalHill
Insights



INTRODUCTION

- The new invitation-only audio-chat app, Clubhouse, launched in March 2020, has generated significant buzz over the past three months. A social network built around real-time audio chat, Clubhouse has shown explosive growth in [app downloads](#), claiming to have [10 million weekly active users](#) as of February 21, 2021.
- What are people saying about the Clubhouse app? Who's behind the buzz? Who's using Clubhouse? What are their early impressions?
- To answer these questions, Signal Hill Insights took an early look at Clubhouse, in partnership with Digital Hug, a leading international social media insight and strategy consultancy.
- This report summarizes results from the following:
 - An analysis by Digital Hug of 1,000,000 social media posts generated by 580,000 unique global authors, 49% originating from the US and Canada
 - Using Canada as a proxy market for early penetration and opinions of Clubhouse, Signal Hill Insights surveyed a representative online sample of Canadians from Maru Voice Canada on March 9th and 17th, 2021. (Total sample size: 3,021 Canadian adults)



TAKEAWAYS

- **It's still early days.** Despite a big buzz and dramatic growth over the past three months, Clubhouse is still far from reaching critical mass.
- **Clubhouse is attracting a distinct early adopter profile.** Males and social media users under the age of 35 are most likely to be talking about it—and are even more likely to have used the app.
- **The chance to build community and professional connections is an early strength.** Social media sentiment is largely positive, with participation over-indexing among those working in sales/ marketing and banking, and among entrepreneurs and executives.
- **The jury is still out on Clubhouse's long-term prospects.** Skepticism around its value and utility was a barrier for many Canadians who heard of the app but haven't used it. Even among those who have used Clubhouse, few are yet to be convinced “it's going to be a big success.”

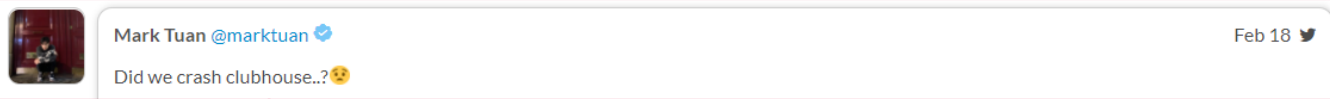


THE BUZZ ABOUT CLUBHOUSE THE VIEW FROM SOCIAL MEDIA

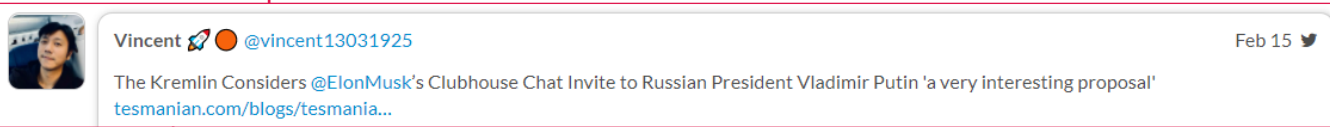


HEAVY SOCIAL POSTS FROM MID-FEB TO MID-MARCH, SPARKED BY CELEBRITIES

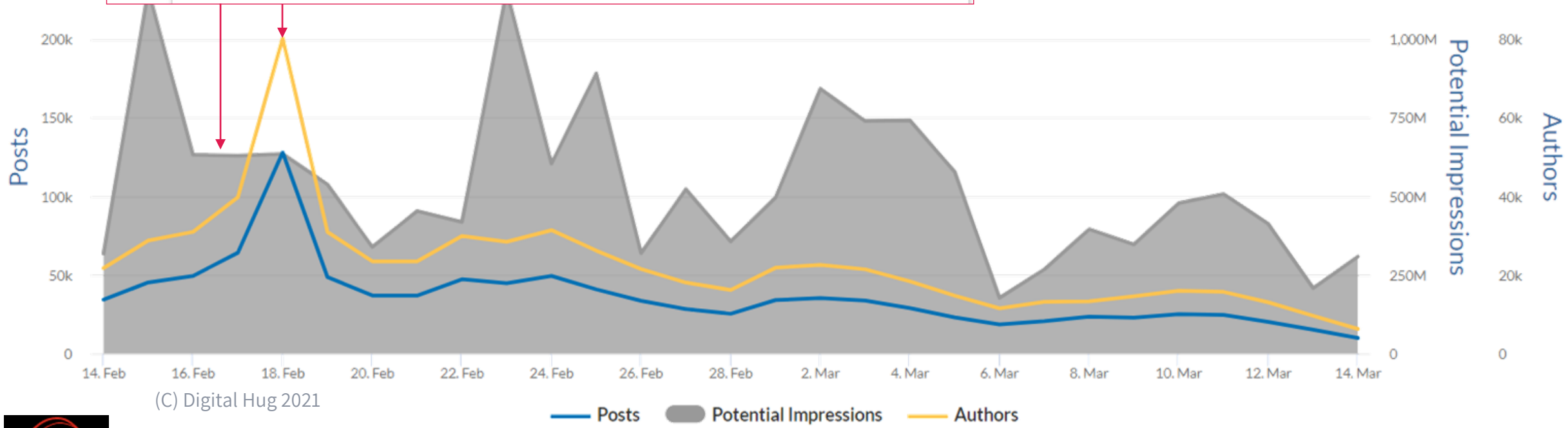
Mark Tuan tweets about Clubhouse – American rapper member of the South Korean boy group Got7



Elon Musk hosted an audio-chat on Clubhouse with Robinhood CEO Vlad



1,029,378 Posts	15,352,158,875 Potential Impressions	579,354 Authors
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SOURCE: Digital Hug Clubhouse Exploration: In field: Feb 14 – March 14, 2021: All regions; English language only
 Primary keywords: Clubhouse, "club house", @clubhouse, #clubhouse, #clubhouseinvite, #clubhouseinvitation

SOCIAL MEDIA SENTIMENT LARGELY POSITIVE

- Positive posts about the Clubhouse app outranked negative posts by a 2-to-1 ratio. Nearly a third of the positive posts were centred on its popularity.

~7% of posts were positive - spread across 5 top themes

- 1) Popularity** - can join live conversations with people and topics they follow; has attracted many celebrities, entrepreneurs, startup founders, investors to join the platform (30%)
- 2) Enjoyment** - a goodtime; so much fun; love when people are nice and welcoming; really enjoyed the conversation (26%)
- 3) Networking** - excellent platform to communicate with like-minded professionals in your field; impromptu focus groups (19%)
- 4) Niche Communities** - Can share ideas, converse and talk freely about subjects that you love (13%)
- 5) Free Speech** - offers some users a rare chance to discuss political topics uncensored & freely (12%)

~3% of posts were negative - spread evenly across 5 top themes

- 1) Dissing by Discord fans** - Clubhouse is for people that think they're too cool for Discord
- 2) Social Concerns** - about hate speech, harassment and misinformation
- 3) Mechanics** - too many notifications; privacy - the App uploads ALL your contacts; not available on Android; join by invite only
- 4) Format** - talking to strangers is exhausting; prefer talking in person; not an extrovert; public speaking anxiety; quality is inconsistent
- 5) Podcast preference** - inefficient vs podcasts; no recorded sessions is a drawback; prefer curated, permanent content



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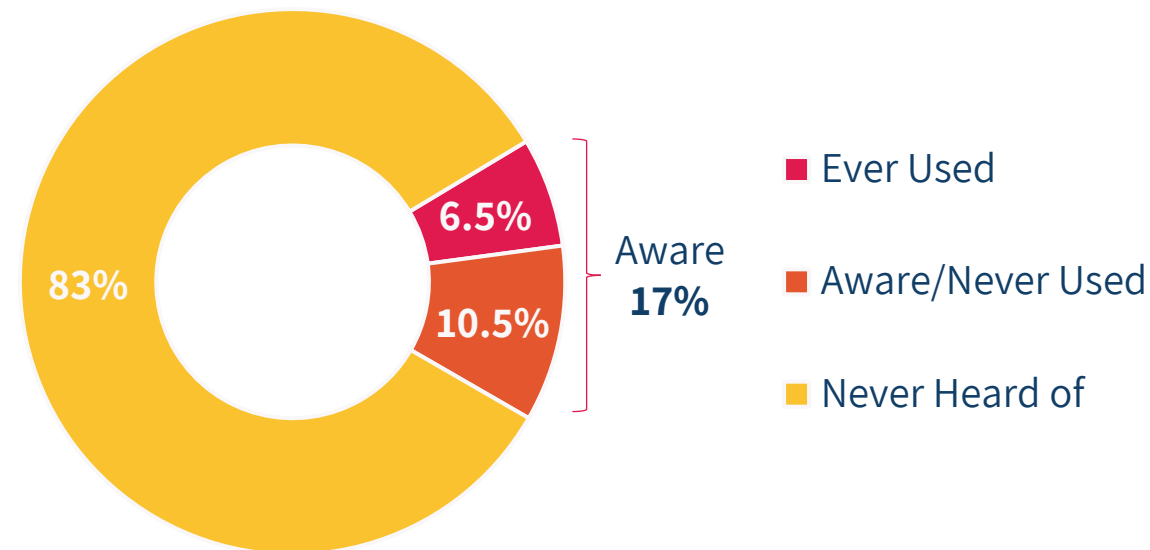
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WHO'S USING CLUBHOUSE? SURVEY RESULTS AMONG CANADIANS 18+

AWARENESS AND USAGE OF THE CLUBHOUSE APP STILL A SMALL SLICE OF CANADIAN ADULTS

- Despite all the buzz, more than 8-in-10 Canadian adults have yet to hear of Clubhouse. A little more than one-third of those aware of the app say they have used it.

Awareness and Usage of Clubhouse App

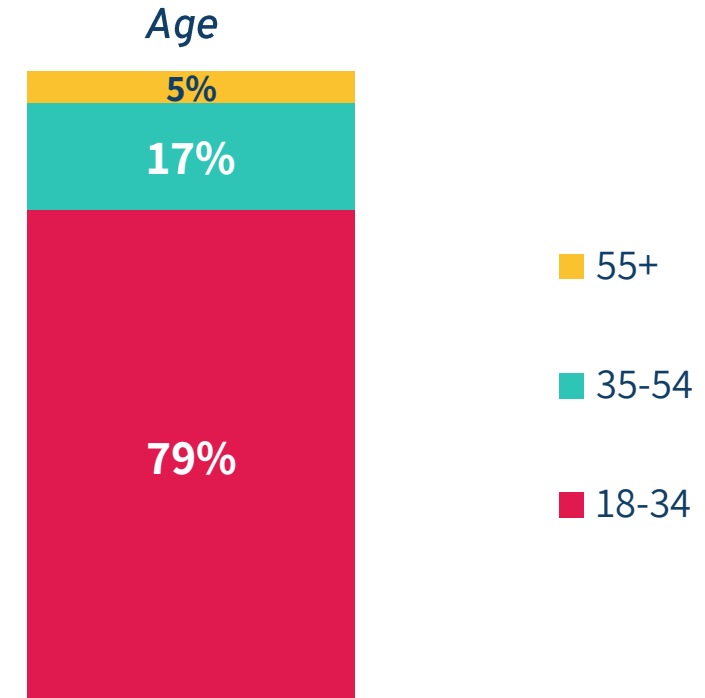
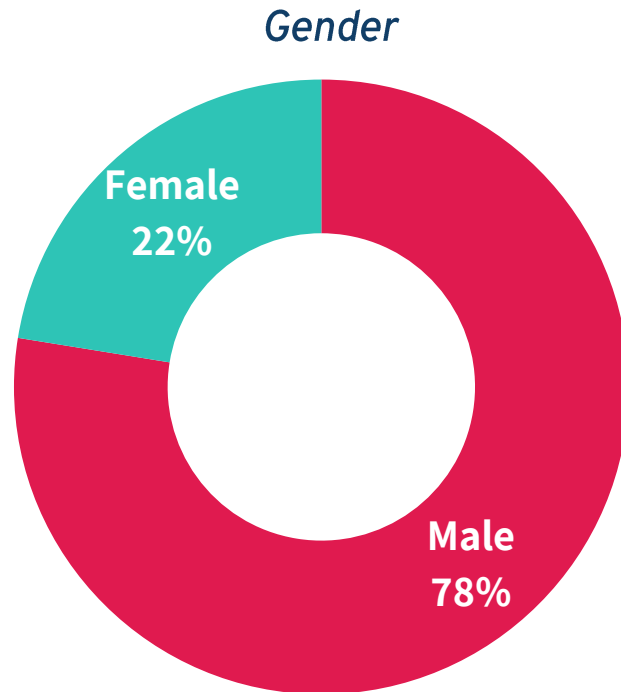


C1. Which of the following best describes your most recent experience, if any, with 'Clubhouse,' the new audio-based social networking app?
Base: Canadians aged 18+, ; March 17, 2021 (n=1,511)

USER BASE IS AN EARLY ADOPTER PROFILE ON STEROIDS

- Clubhouse users skew sharply towards the typical early adopter profile—men and 18-34 year-olds, with few users aged 55 or older.

Ever Used Clubhouse

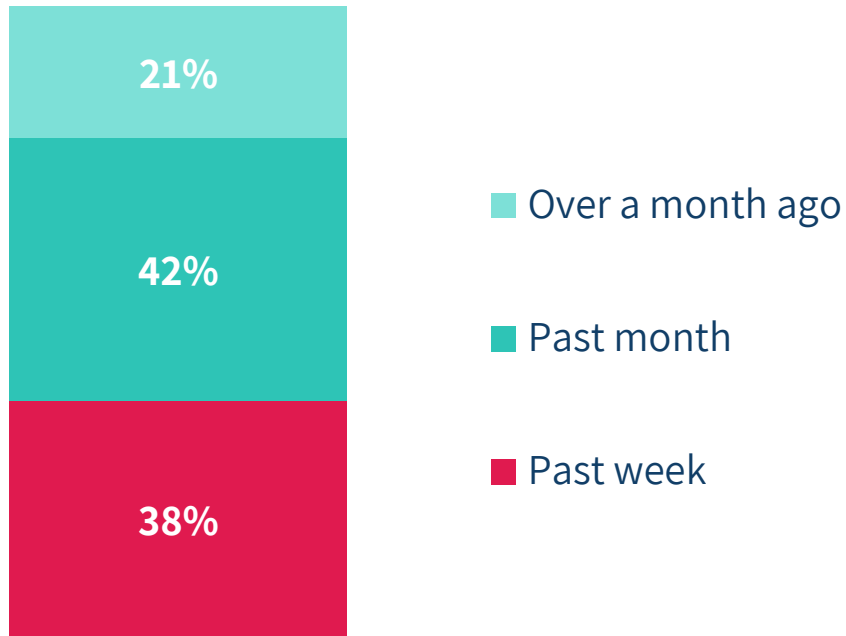


Base: Canadians aged 18+ who have ever used Clubhouse , March 17, 2021 (n=93)

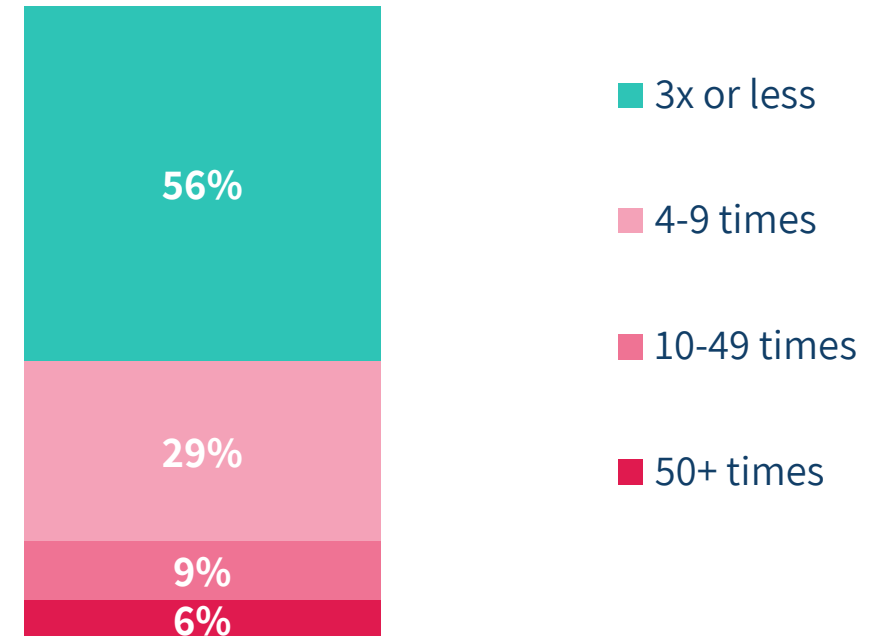
FOUR-IN-TEN CLUBHOUSE USERS HAVE CONVERTED TO REGULAR USERS

- A total of 44% of Canadian adults who have used Clubhouse have done so more than 3 times, while 38% report having used the app in the past week.

Most recent use (among ever used)



of times used in past 3mo. (among ever used)

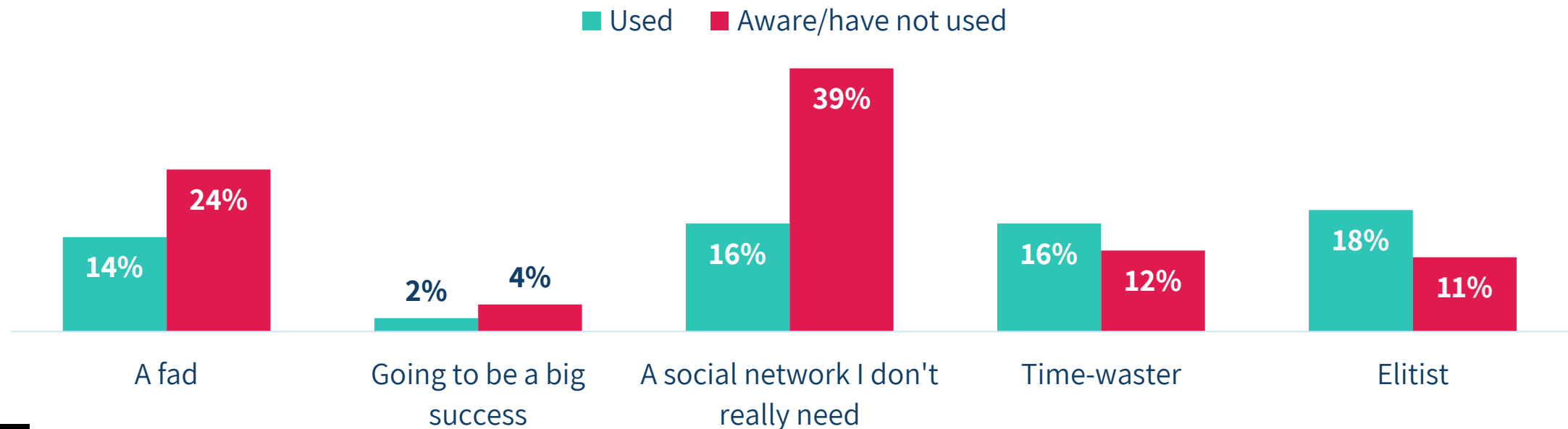


C1. Which of the following best describes your most recent experience, if any, with 'Clubhouse,' the new audio-based social networking app?
C2. Thinking back over the past 3 months, how many times would you say you have used the Clubhouse social networking app?
Base: Canadians aged 18+ who have used Clubhouse, March 17, 2021 (n=93);

SPLIT OPINIONS ON CLUBHOUSE PROSPECTS AND UTILITY AMONG USERS AND NON-USERS

- Canadian adults who are aware of Clubhouse but never used it are more likely than users to dismiss Clubhouse as a social network they don't really need. Yet, even among users, only 2% are convinced it's 'going to be a big success,' while 14% see it as 'a fad,' leaving more than 80% unwilling to weigh in one way or the other.

Which of the following words or phrases would you say best describes Clubhouse? (multiple responses accepted)

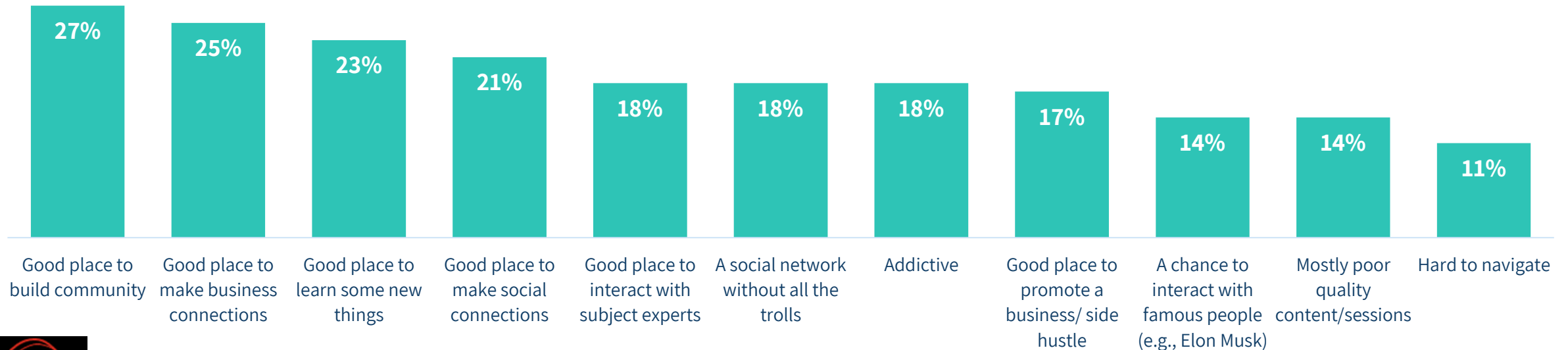


C3. Which of the following words or phrases would you say best describes Clubhouse?
Base: Canadians aged 18+ who have used Clubhouse, March 9th, 2021 (n=89); aware never used it (n=171)

COMMUNITY AND CONNECTIONS SEEN AS KEY BENEFITS AMONG USERS

- Canadian adults who have used Clubhouse list the opportunity to build community and make business connections among its leading attributes. Comparatively few see it as a chance to interact with famous people or complain about session quality or navigation on the app.

Which of the following words or phrases would you say best describes Clubhouse? (multiple responses accepted)



C3. Which of the following words or phrases would you say best describes Clubhouse?
Base: Canadians aged 18+ who have used Clubhouse, March 9th, 2021 (n=89)

WHO'S TALKING ABOUT CLUBHOUSE? SOCIAL MEDIA AUTHOR DEMOGRAPHICS

BUSINESS/SALES PROFESSIONS OVER INDEX FOR SOCIAL POSTS ABOUT CLUBHOUSE

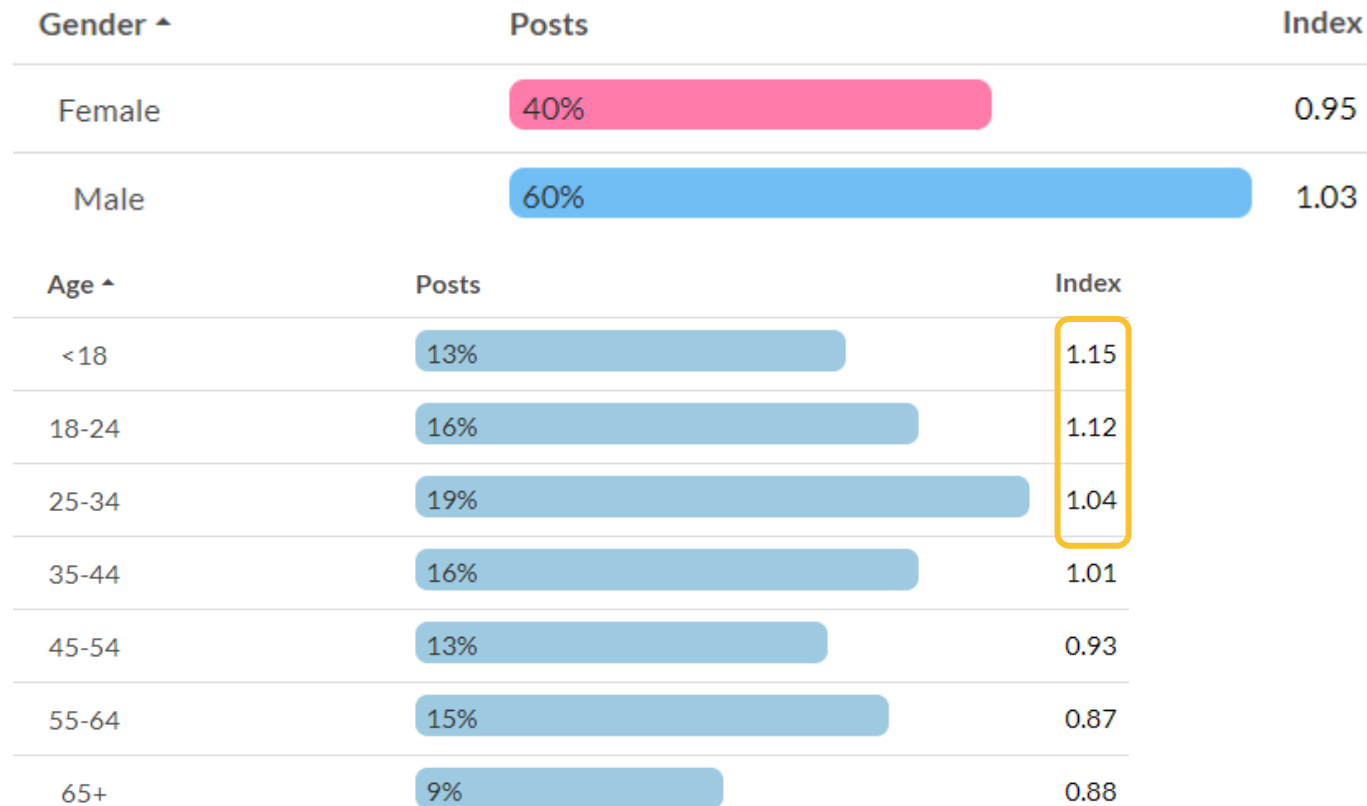
Professions	Posts ▾	Index ▾
Creative Arts	40%	0.77
Sales and Marketing	13%	2.62
Executive Management	10%	2.09
Banking and Finance	8%	2.88
Technology	8%	1.27
Entrepreneurship	8%	2.2
Student	6%	1.03
Science and Research	5%	0.95
Education	5%	0.56
Blogging	5%	1.11
Journalism	5%	0.84
Law and Order	3%	0.58
Health and Medicine	1%	0.5
Construction	1%	1.26
Personal and Home Services	1%	0.79

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 Authors: Clubhouse related post authors: Index: Clubhouse Twitter-only author results index to Twitter general author population

MALES AND <34 DEMOS OVER-REPRESENTED AMONG THOSE TALKING ABOUT CLUBHOUSE



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SOCIAL TALK ABOUT CLUBHOUSE OVER INDEXES AMONG THOSE INTERESTED IN TECH & FASHION

Interests	Posts	Index
Family	18%	0.81
Music	14%	1.07
Religion	11%	0.93
Food and Drink	10%	0.98
Politics	9%	0.96
Sports	9%	0.77
Arts and Crafts	8%	0.98
Fashion	7%	1.83
Technology	6%	3.34
Literature	6%	1.11
Travel	5%	1.24
Pets	5%	0.62
Photo and Video	4%	1.12
Gaming	3%	0.61
Movies	3%	1.08
Television	3%	1.01
Anime and Comics	2%	0.57
Health and Fitness	2%	1.32

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TOP 10 COUNTRIES ORIGINATING POSTS ABOUT CLUBHOUSE

- North America accounts for half of all English-language social media posts about Clubhouse.

Share of Posts

Geolocation	Share of Posts
United States	45%
United Kingdom	10%
Canada	4%
India	4%
Indonesia	4%
Malaysia	4%
Thailand	3%
Nigeria	3%
Germany	1%
Australia	1%

Top Posts, Per Capita

Geolocation	Per Capita Posts
Isle of Man	166
Marshall Islands	100
Kuwait	78
United Kingdom	68
Grenada	65
United States	61
Qatar	56
United Arab Emirates	56
Maldives	55
Malta	53

Posts Per Capita – Other Top Countries

Geolocation	Per Capita Posts
Canada	49
India	1
Indonesia	6
Malaysia	51
Thailand	22
Nigeria	7
Germany	8
Austria	4

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ABOUT SIGNAL HILL INSIGHTS AND DIGITAL HUG

SignalHill
Insights



ABOUT SIGNAL HILL INSIGHTS

- Signal Hill Insights is a media research consultancy with a deep expertise in audio content. We partner with broadcasters, publishers and advertisers to tap new opportunities in audio.
- No cookie-cutter research. No data dumps. Reporting always goes beyond the numbers, distilling the data and applying our audio expertise to help you see the path ahead.
- Among our research services:
 -  *Brand Lift Studies:* Checking that your campaign is working at the top as well as the bottom of the marketing funnel
 -  *Brand Health Studies:* We help you monitor how well your business is satisfying your audiences' changing needs
 -  *Qualitative Research:* Focus groups, personal inter, or ethnography to bring the changing audio landscape into focus.
 -  *Content Testing:* Moment-by-moment dial testing to dig into the strengths and weakness of your audio content
 -  *Environmental Scans:* When you need an overview of a new trend, our environmental scan can help you make sense of it all
- For more information, please contact jeff@signalhillinsights.com

ABOUT DIGITAL HUG

- Digital Hug helps companies “Make Better Decisions” by listening carefully to unstructured social media data to better understand audience engagement at both the tactical and strategic level. We help re-frame strategic opportunities and refine program execution. We also bring valuable insight to “Content” Life-cycle management including – competitive landscape analysis; topic and talent selection; content development; promotion activation; press coverage; influencers selection and effectiveness tracking; and fan engagement.
- Our key services feature:
 - *Social Context* – Competitive/Benchmark Monitoring; NPS Drivers
 - *Social Ethnography* - Category Advancement
 - *Overnight Insight* - Activation Optimization; Test & Learn System/Benchmark performance
 - *ESG Assess* - Strategy & Risk
- Digital Hug utilizes proprietary, state of the art NLP technologies and techniques to consistently deliver actionable insights to help grow, optimize, and protect your IP, Brand or Franchise. We follow a traditional research house model i.e.; our work is advertising agency independent - completely objective and unbiased.
- For more information, please contact alan@digitalhug.com

