

Social Media Reality Check 2011 Research Findings

Social Media
Reality Check

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Background

- One of the most quickly evolving areas in the communications profession is social media.
- In 2009, CNW and Leger Marketing conducted the first *Social Media Reality Check*, a unique study that explored professional communicators' use of social media compared with consumer opinions about social media influence on their purchasing behavior.
- This year, we've conducted the second installment, and uncovered some interesting findings.

Questions to be Answered:

- What are communication professionals' perceptions about the use of social media and what's their / their company's stake in it? How is it changing/growing? Are they on the right track with their audience?
- How does the general public use social media to gather information about the products they use and companies they follow? Are they more positive/loyal/trusting of those companies?



Research Method

1



Two target groups were invited to take the survey :
Sample of **590** Canadian **communication professionals who use social media – 77% of all professionals**
Sample of **1039** Canadian **consumers who use social media – 69% of all online Canadians.**
A new study (Oct 24 – 27, 2011; N=1500) still shows 69% of all online Canadians using social media.

2



Target groups were accessed via CNW contact lists and Leger's online panel. Respondents completed a 10 - 15 minute online questionnaire from **April 19 – May 9, 2011.**

3



Findings from both target groups were analyzed together. Results from the 2009 study were compared to this year's results. Results can be considered accurate to within +/- 4.03% for communication professionals and +/-3.04% for users, at the 95% confidence level.

Social Media Usage among consumers and communications professionals

Social Media
Reality Check

Within this report, comparisons and key findings from the 2009 iteration of this study are found within a blue border like the one shown here.

Social Media
Reality Check

In 2009, usage levels of social media was significantly lower than it is in 2011. Twitter, in particular, has become nearly ubiquitous among communication professionals. The use of blogs has remained stable over the past two years.

Most Used Sites

Communications Professionals

Consumers



	2011	2009
Facebook	81%	58%
Twitter	76%	39%
LinkedIn	75%	75%
YouTube	72%	57%
BLOG	54%	52%
Wikipedia	50%	59%
Skype	34%	19%
Flickr	34%	17%









	2011	2009
Facebook	87%	77%
Twitter	32%	8%
LinkedIn	25%	10%
YouTube	76%	65%
BLOG	21%	24%
Wikipedia	61%	-
Skype	44%	-
Flickr	18%	12%

Usage levels continue to change, though with Facebook growing even higher in the past 6 months









Most Used Sites

New results as of October 27, 2011

Communications Professionals

	2011	2009
	81%	58%
	76%	39%
	75%	75%
	72%	57%
	54%	52%
	50%	59%
	34%	19%
	34%	17%

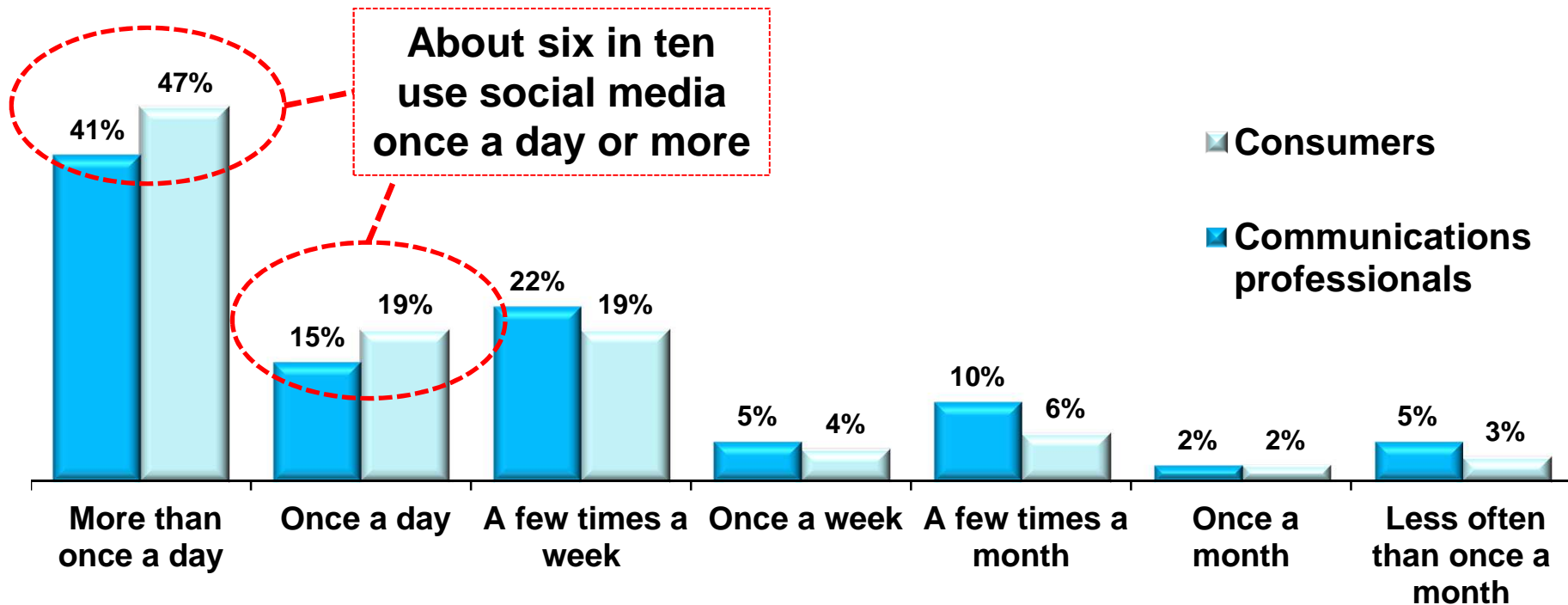
Consumers

	+ 2011	2009
	91%	77%
	32%	8%
	26%	10%
	69%	65%
	19%	24%
	51%	-
	42%	-
	15%	12%



While the frequency of social media usage by communications professionals has remained consistent since 2009, the number of consumers who use social media more than once per day has increased by 10%

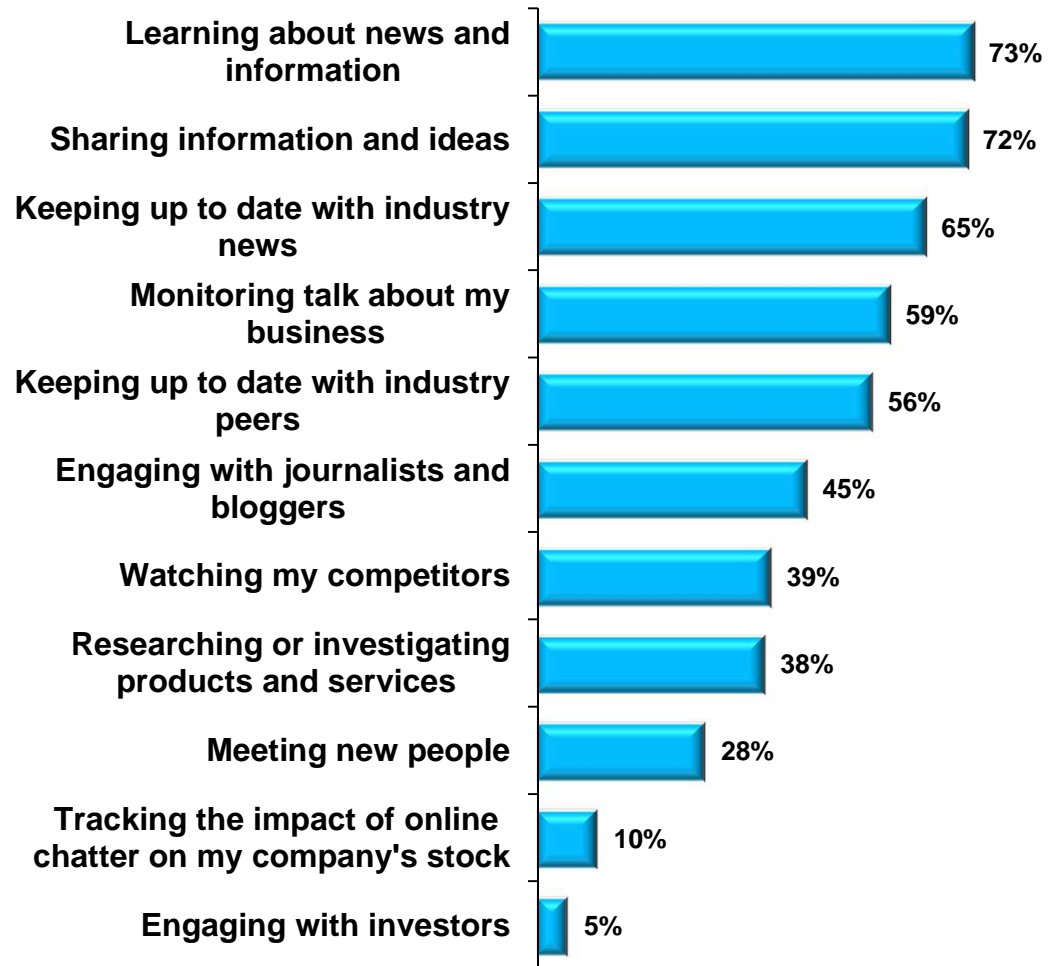
Frequency of Use



The top three reasons for using social media still apply as they did in 2009.



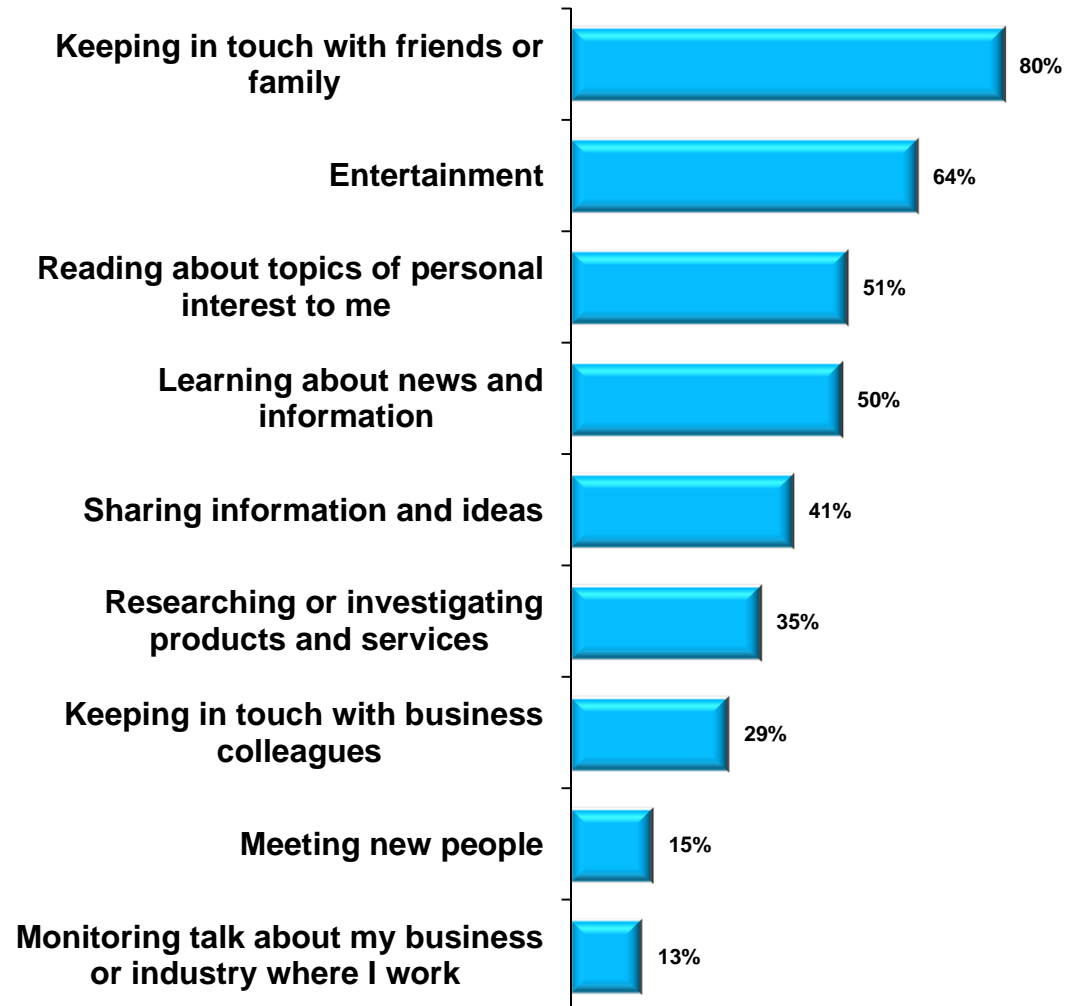
Uses for Social Media Among Communications Professionals



While the 2009 study examined personal and professional uses separately, keeping in touch and entertainment are still on top.



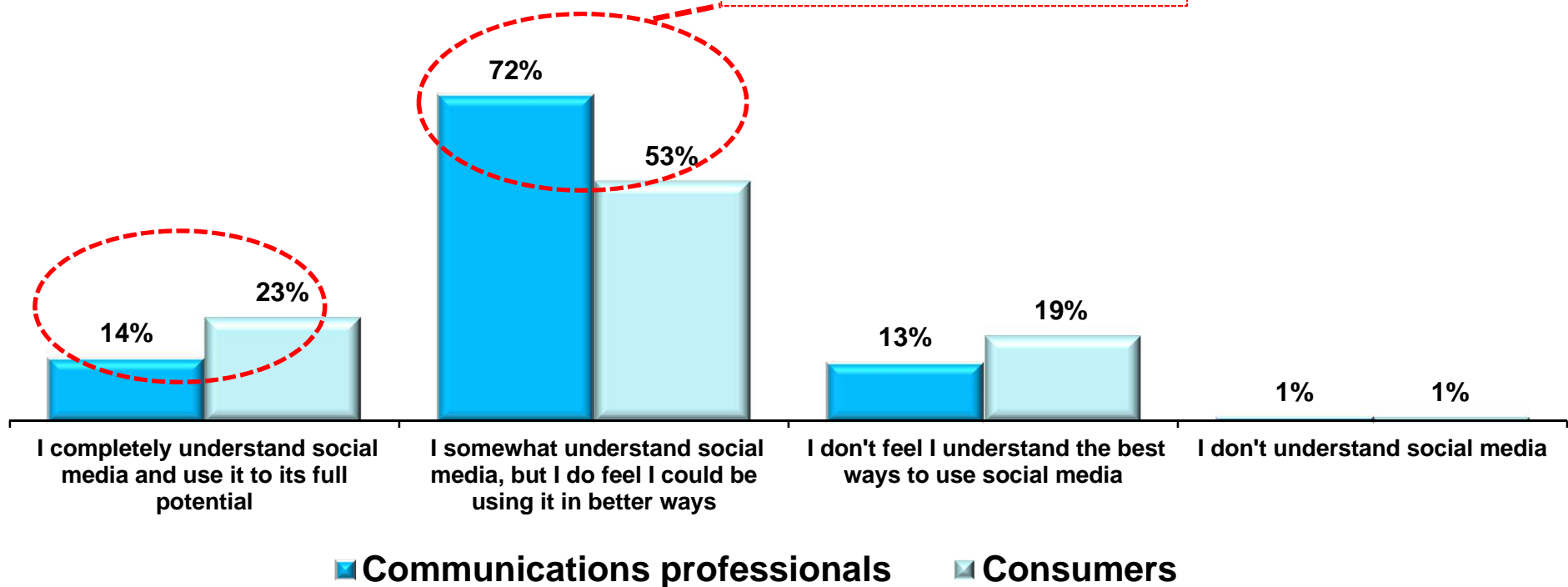
Uses for Social Media Among Consumers



As in the 2009 study, there is a knowledge gap evident among both consumers and communications professionals about how to maximize their social media presence.

Understanding of Social Media

More than three quarters from each group at least somewhat understand social media.



Social Media
Reality Check

In 2009, 49% of communications professionals agreed that corporate initiated blogs are self-serving and not believable. This number has decreased substantially in 2011 (31%).

Credibility of Social Media Among Communications Professionals



48% AGREE

Stakeholders find honest, balanced reviews online that they would not have found otherwise



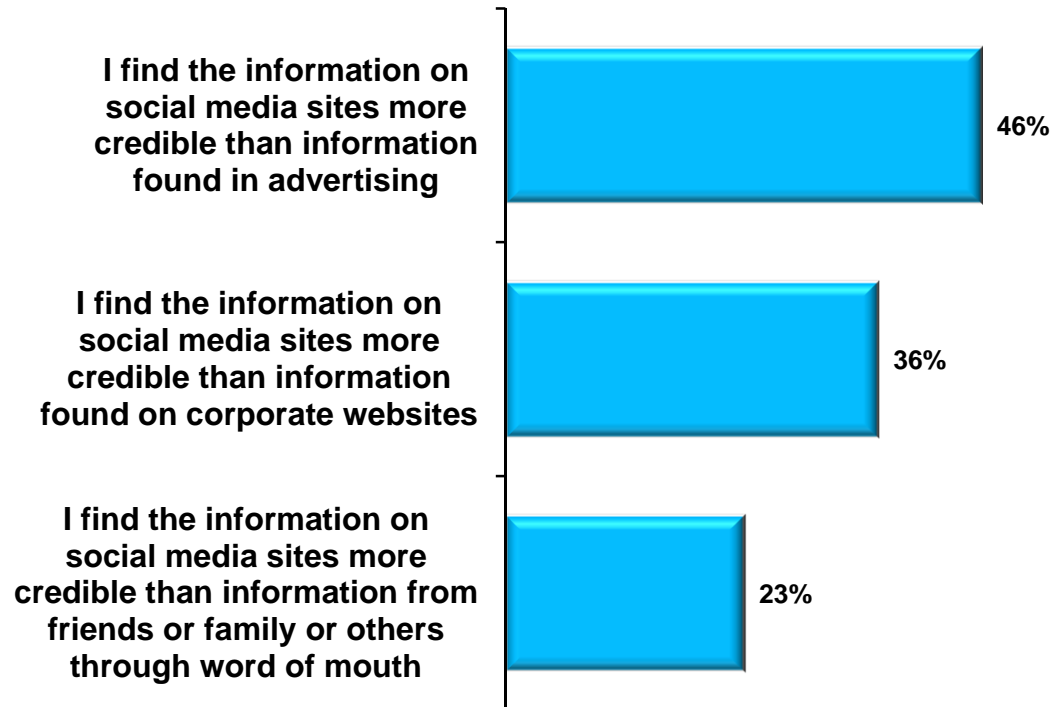
ONLY 31% AGREE

Stakeholders find corporate-initiated or sponsored blogs self-serving and not credible

This year, nearly double the number of consumers indicate that they find honest, balanced reviews online when compared to the 2009 results (60% vs. 34%).

Social media credibility among consumers

Proportion of consumers who agree that...



BLOG



60% AGREE

57% AGREE

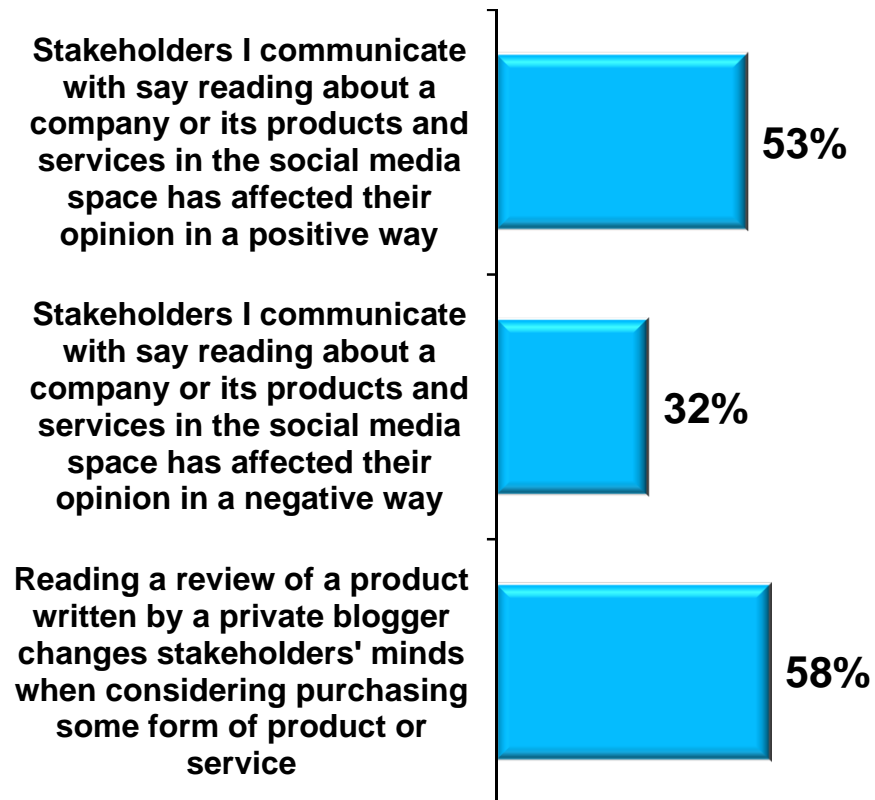
I find honest, balanced reviews online that they would not have found otherwise

Corporate-initiated or sponsored blogs self-serving and are not a believable source of information

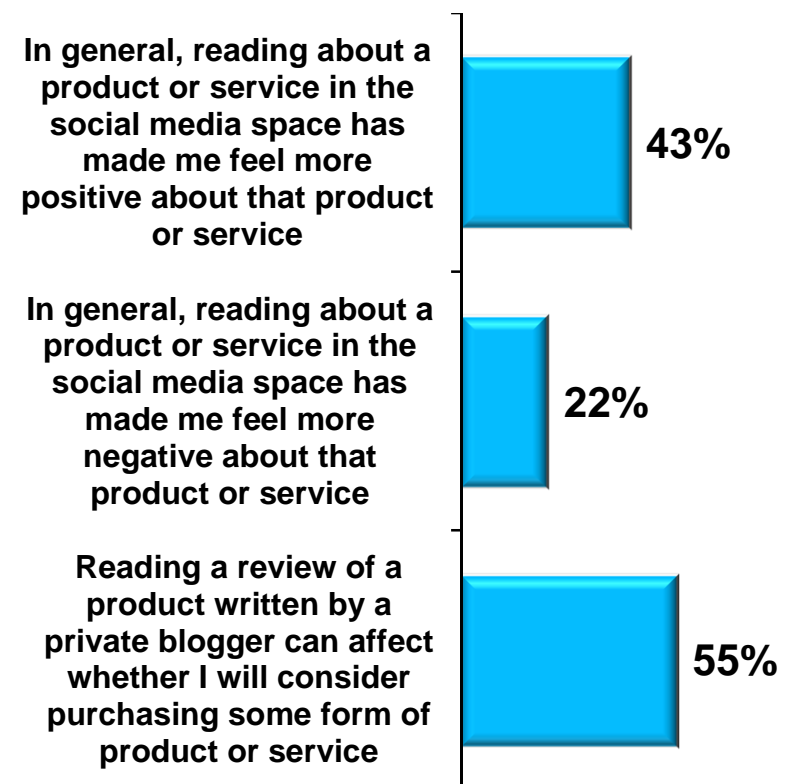
Communication professionals tend to put more stock in the persuasive power of social media than do consumers. This is consistent with the 2009 findings

Social Media: Shaping Opinions

Proportion of professionals who agree that...



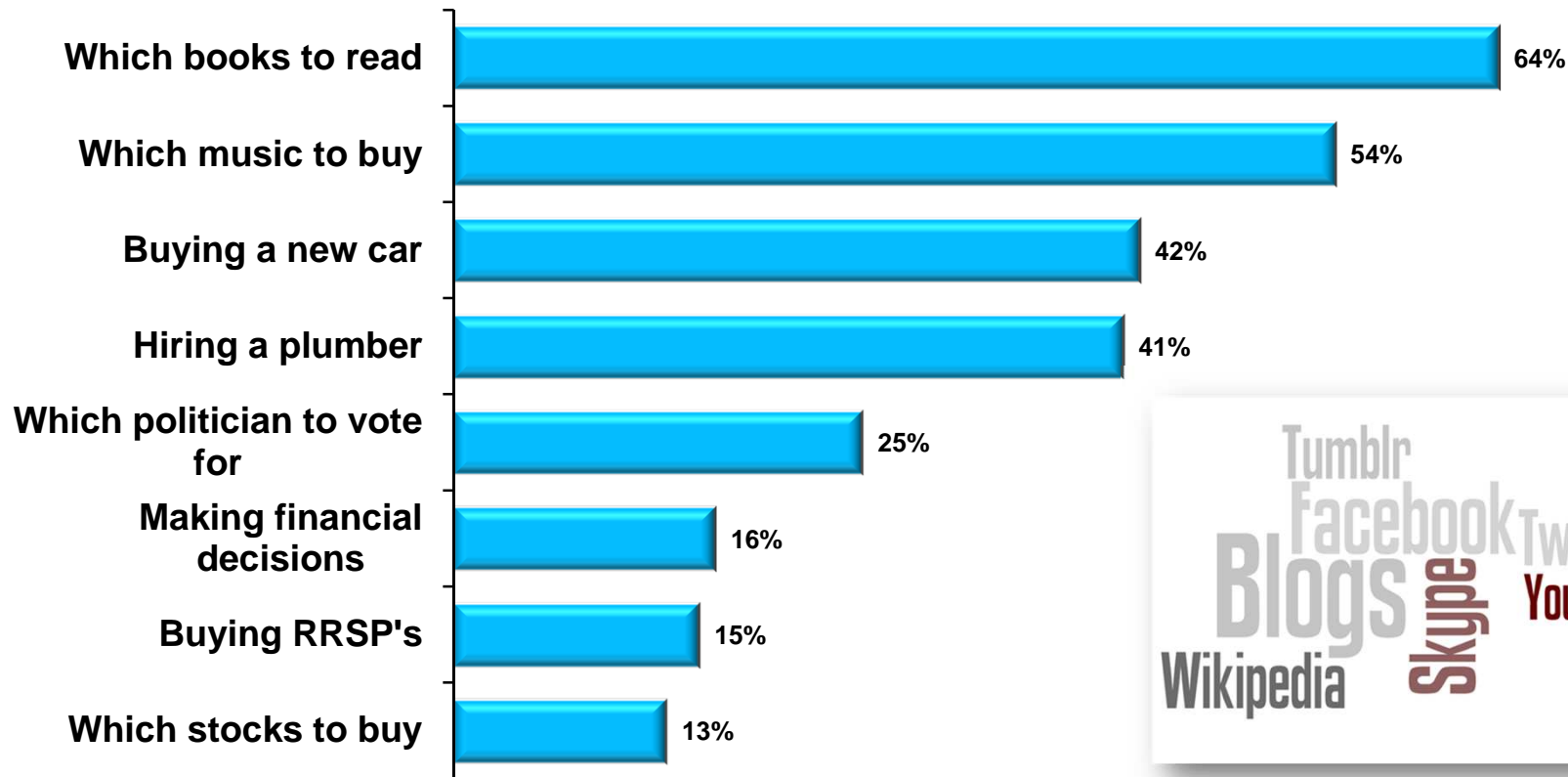
Proportion of consumers who agree that...



Smaller purchasing decisions are the most readily influenced by social media. Financial decisions are less influenced by social media.

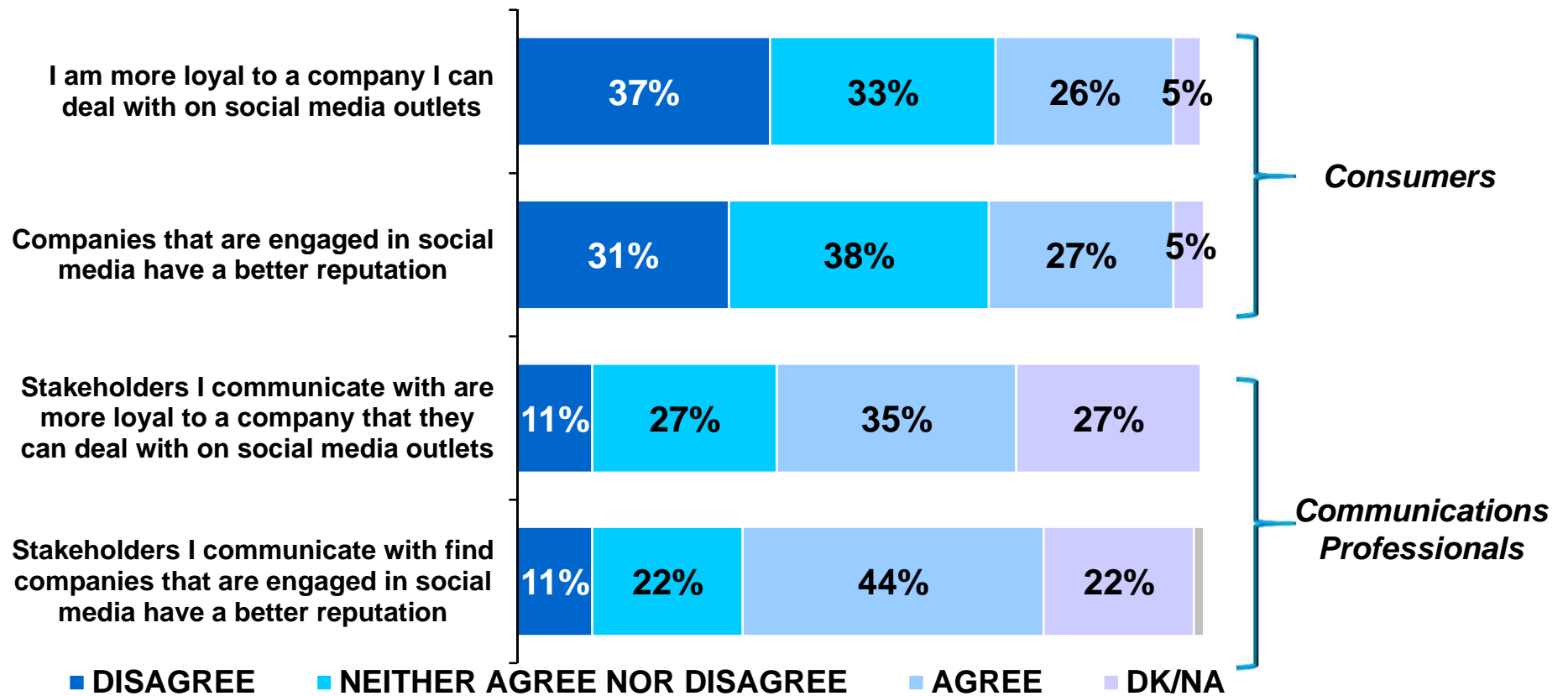
The Influence of Social Media On Consumer Purchases

I would trust social media to help me make decisions on...



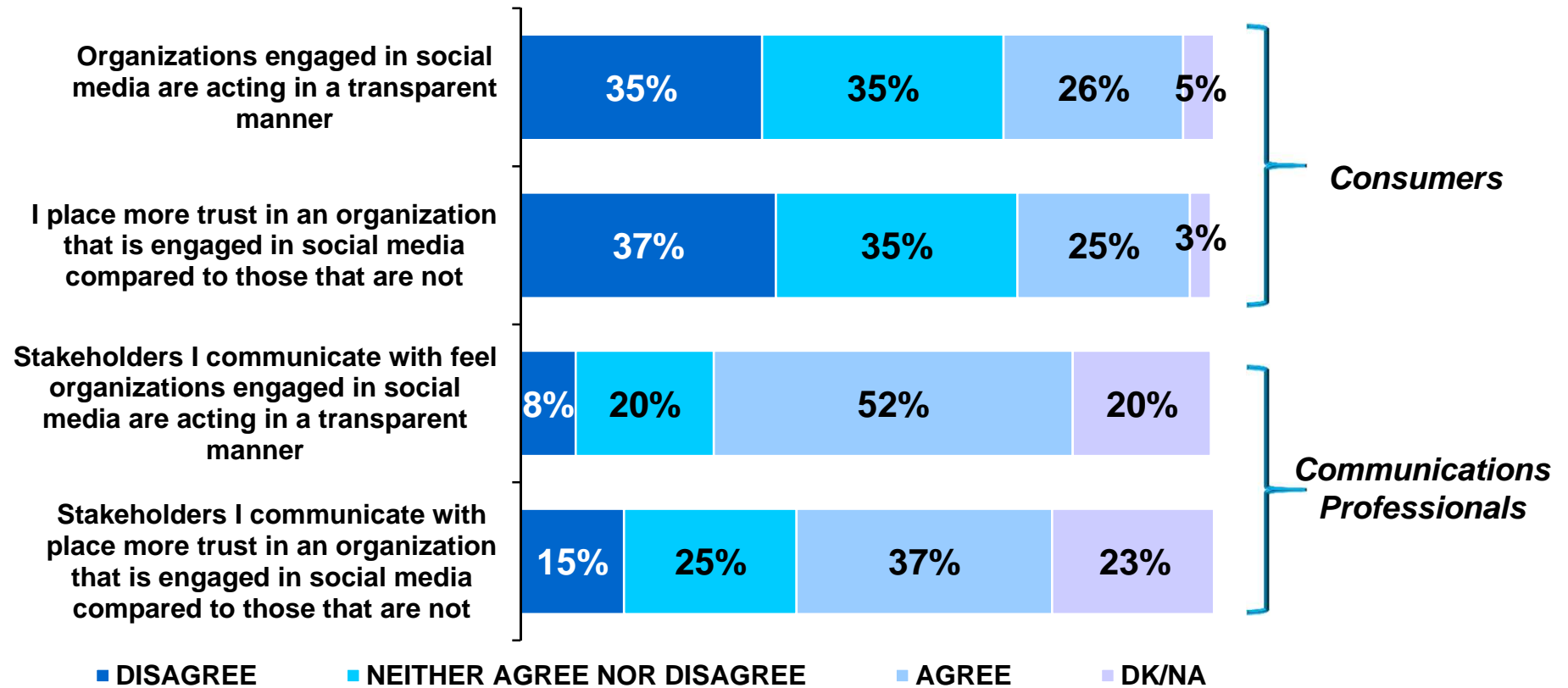
The findings in 2011 concerning reputation and loyalty are nearly identical to the findings in 2009. Consumer opinion has remained virtually unchanged. What is also unchanged is the tendency of communication professionals to overestimate the value of a social media presence.

Social Media: Loyalty and Reputation



Although the proportions differ from 2009, the same patterns emerge in 2011; communications professionals believe social media has more impact than do consumers.

Social media: Trust and Transparency

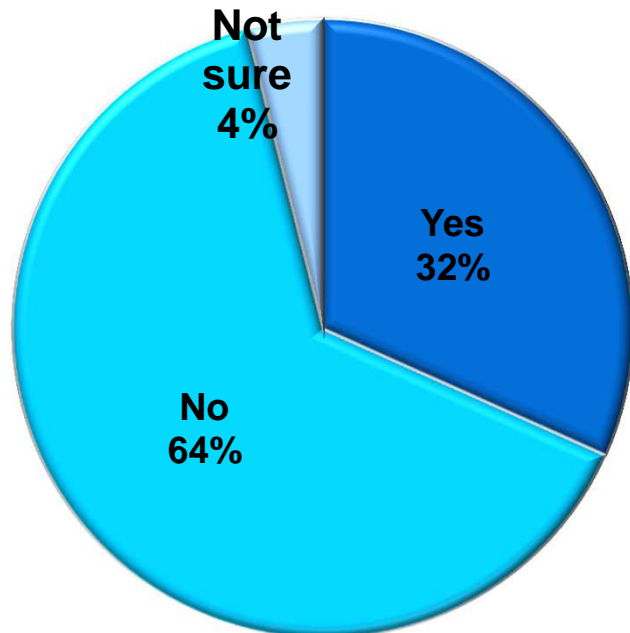


Key findings for communications professionals using social media

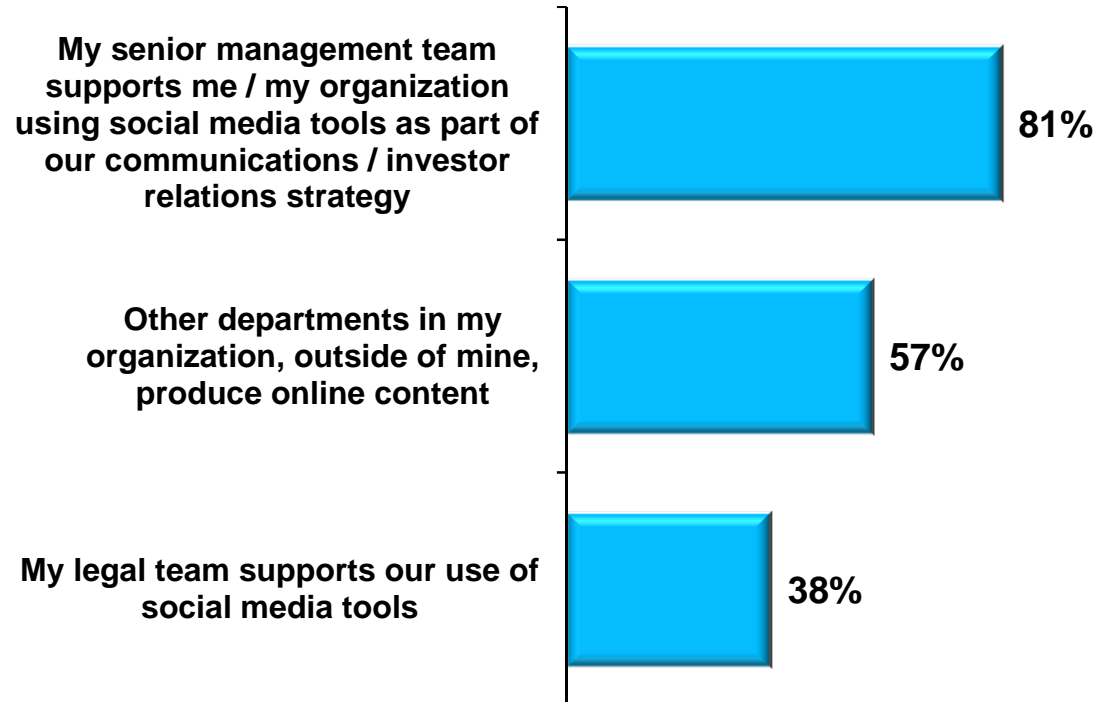
In 2009, only 57% reported that senior management supported the use of social media – this number has increased dramatically in 2011 to 81%.

Organizational Support for Social Media

Does your organization have an employee(s) dedicated to social media?



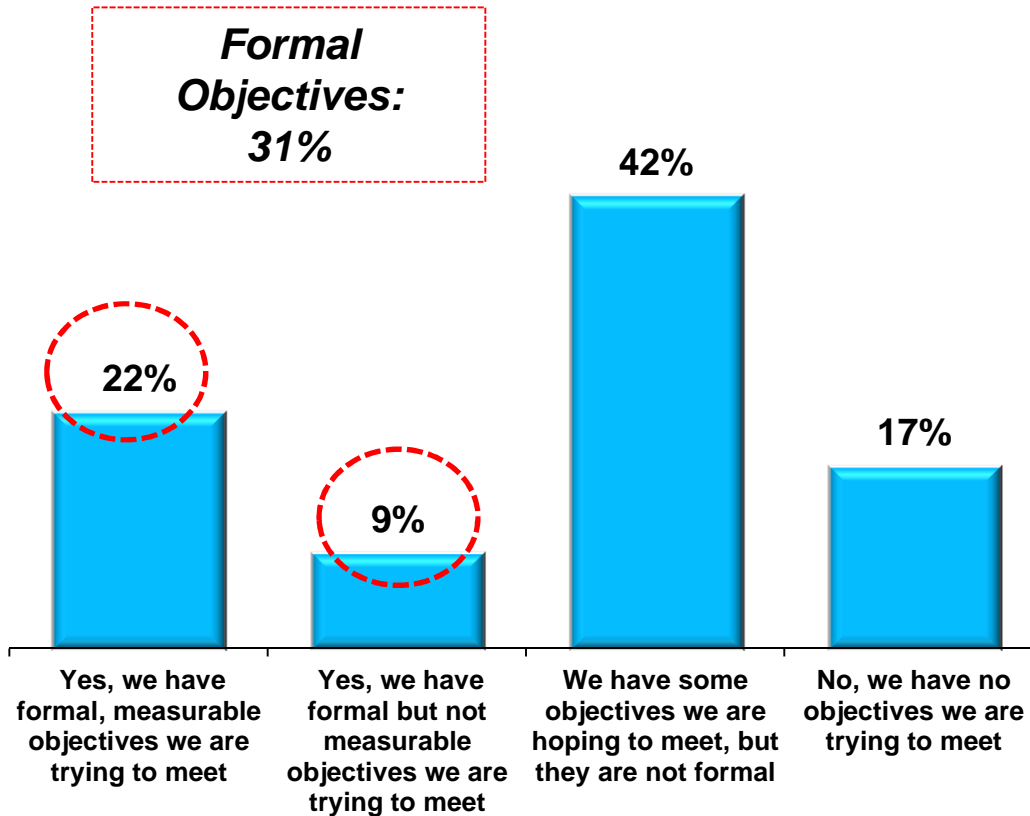
Proportion of communications professionals who agree...



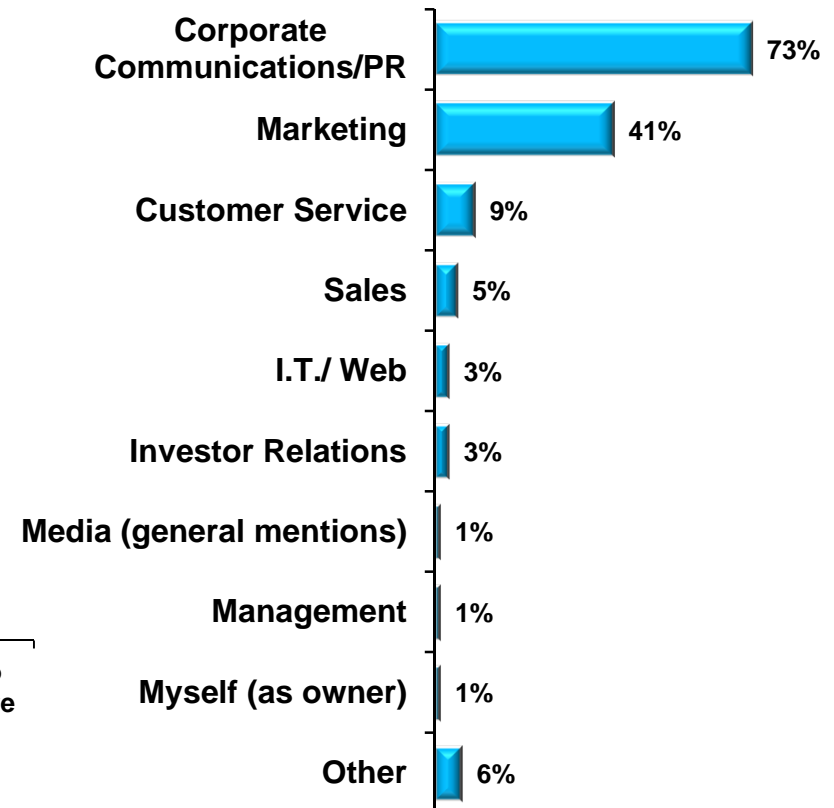
The number of organizations with formal objectives has increased from 2009 (31% vs. 26%), and the number of organizations with no objectives has declined substantially (31% in 2009 vs. 17% in 2011).

Social Media Objectives

Formal Objectives:
31%



Which Departments?



Like in 2009, campaign success is most commonly measured by traffic counts, however the engagement measure has risen dramatically (25% vs. 43%).

Social Media Objectives

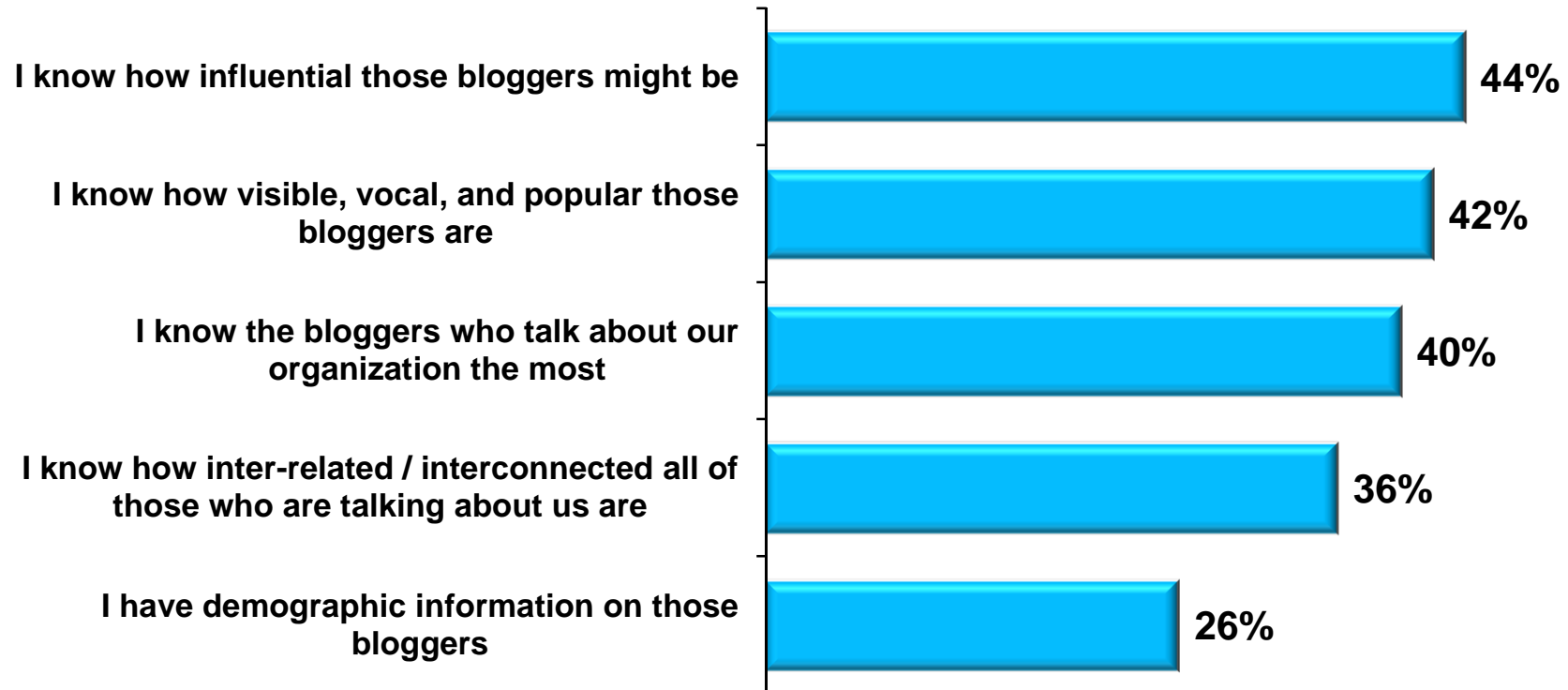
Social Media Campaign Objectives	Percent who identify objective
Visibility	73%
Awareness	70%
Message delivery	59%
Visits	47%
Dialogue and engagement with stakeholders	45%
Generate dialogue / comments	41%
Relationships with stakeholders	41%
Obtain feedback	41%
Friends, followers etc.	39%
Using, sharing, pass-a-long of content	38%
Protect and manage reputation	37%
Establish influence	36%
Volume	28%
Embedding of interactive content	18%
Lead conversion/sales	18%

How do we measure against objectives?	Percent
We look at traffic counts (number of posts, comments, trackbacks, pings, inbound links) where available	62%
We look at engagement	43%
We analyze the content	37%
We look at tone	35%
We look at rankings like Technorati, Alexa, Google	31%
We look at relevance and authority of the blogger and the content	27%
We look at the volume and velocity of message	24%
We look at the ratio of posts to comments (conversation index)	23%
We subscribe to a service	13%
We track and quantify the inter-connectedness and inter-relationships of those who are talking about us	10%

Relative to 2009, more communications professionals are following the blogosphere. Each statement saw a marked increase since 2009.

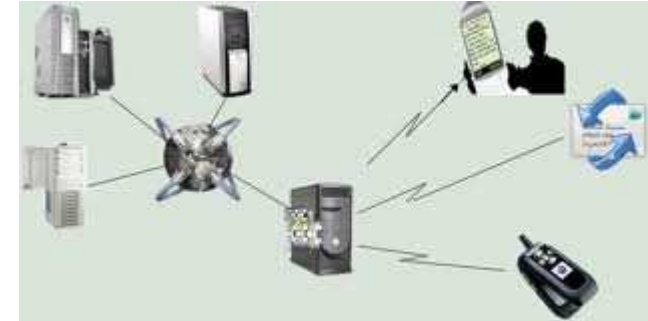
Blogging and Social Media

Communications professionals agree...

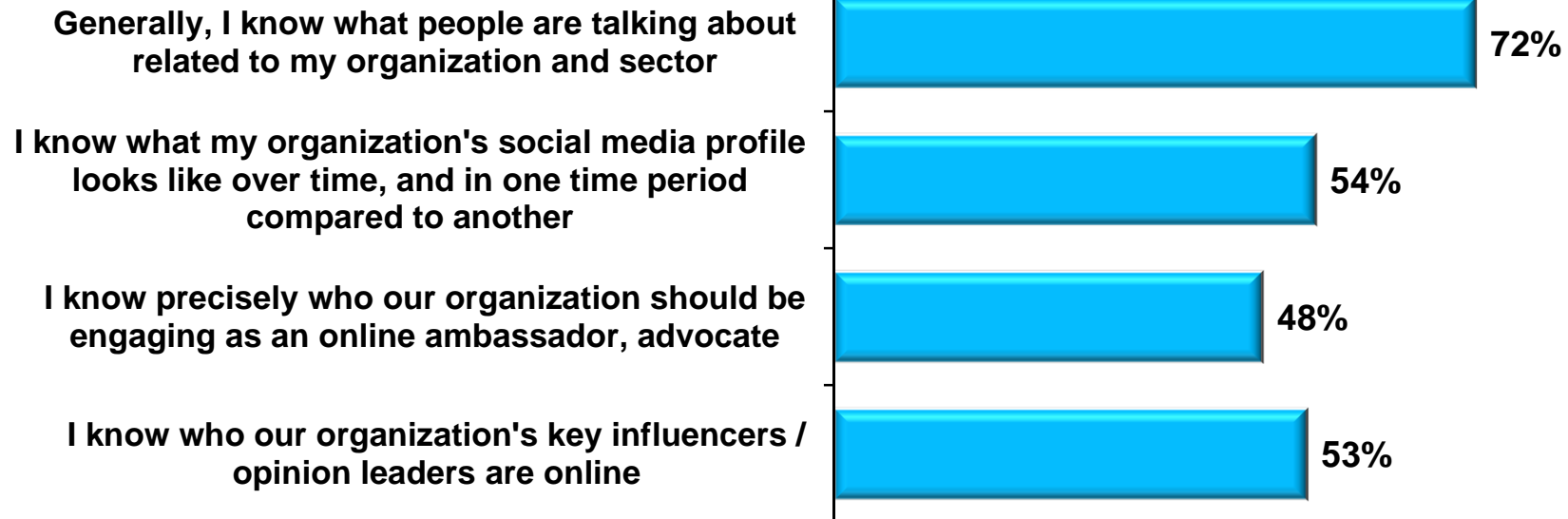


There has been a dramatic increase in awareness of a company's social media profile compared to 2009. Social media has seen a veritable explosion in the world of business over the past two years.

Social Media: Knowledge of Your Organization

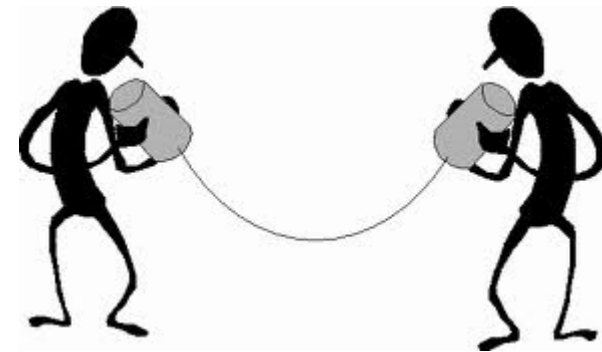


Communications professionals agree...

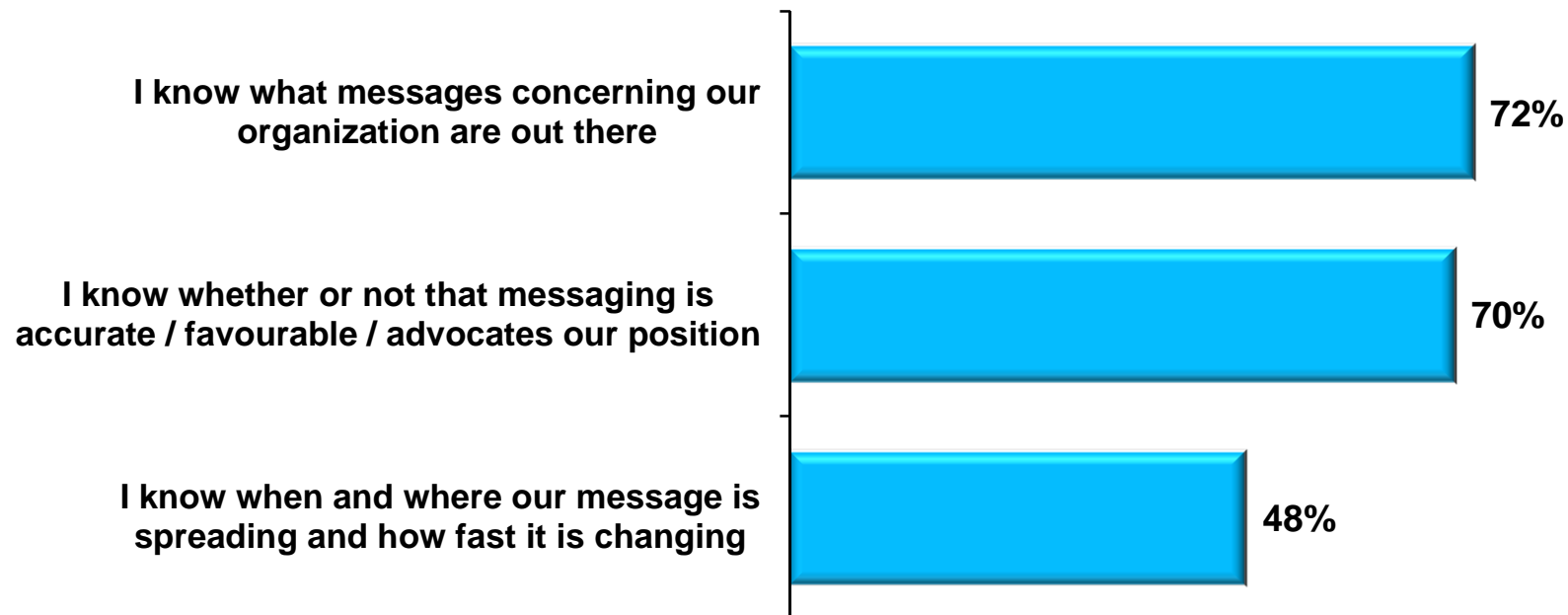


In 2011, communications professionals are significantly more aware of the messages that circulate in social media. In particular, more than triple report that they know where their message is and how fast it is changing (22% vs. 72%)

Social media messaging



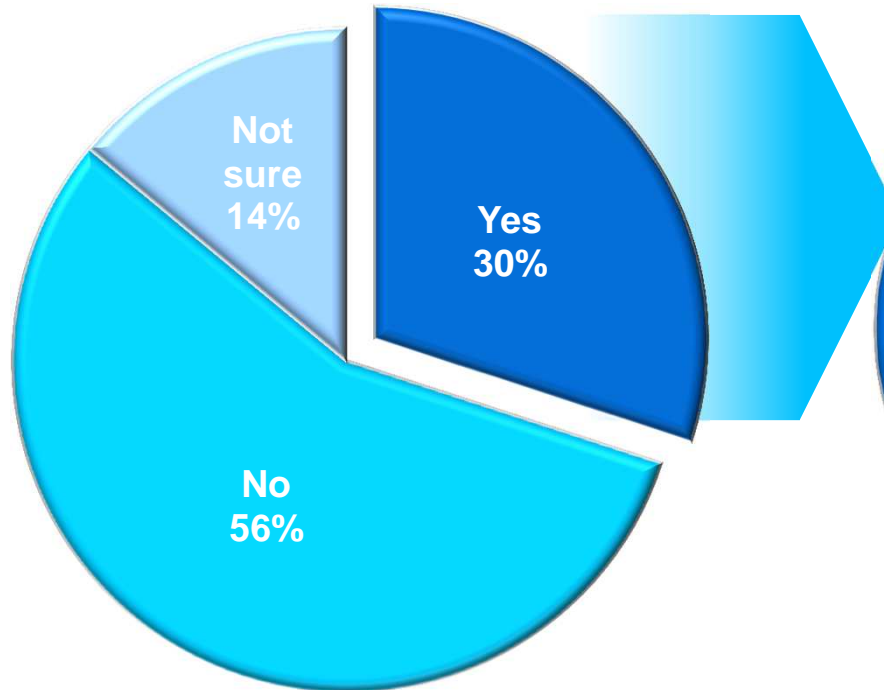
Communications professionals agree...



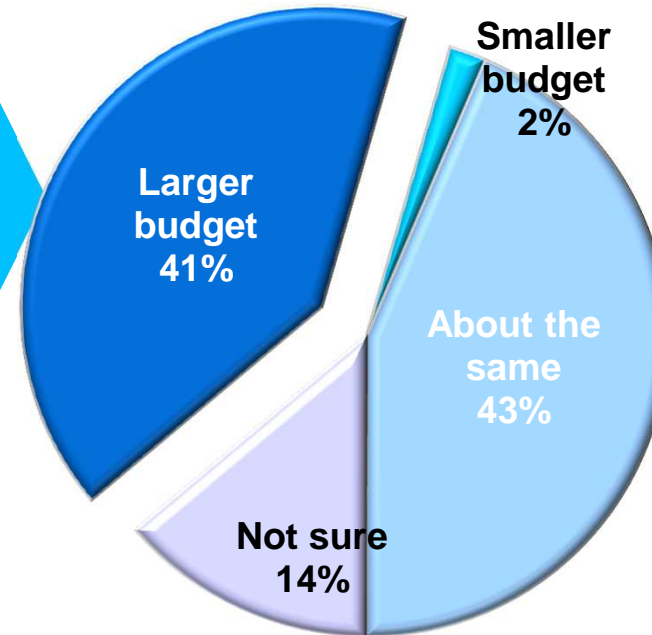
Double the proportion of organizations report a dedicated budget to social media in 2011 vs. 2009 (30% up from 15%).

Social media budget

Does your organization have a social media budget?



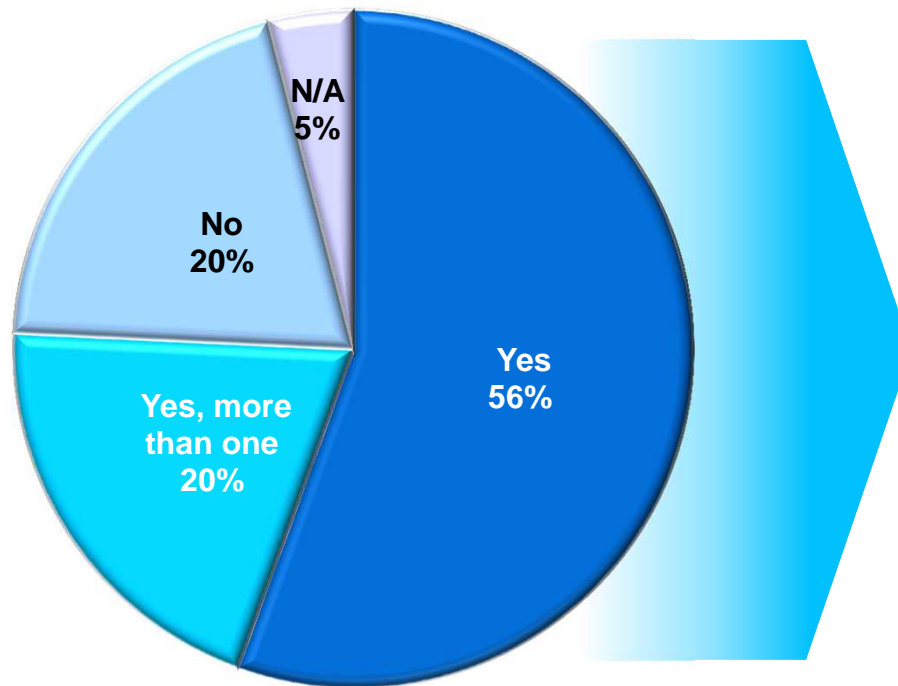
What will your budget look like next year?



Twitter has exploded in popularity since 2009. As a result questions were formulated to specifically address its prevalence among communication professionals.

Twitter Usage

Does your organization have a Twitter account?

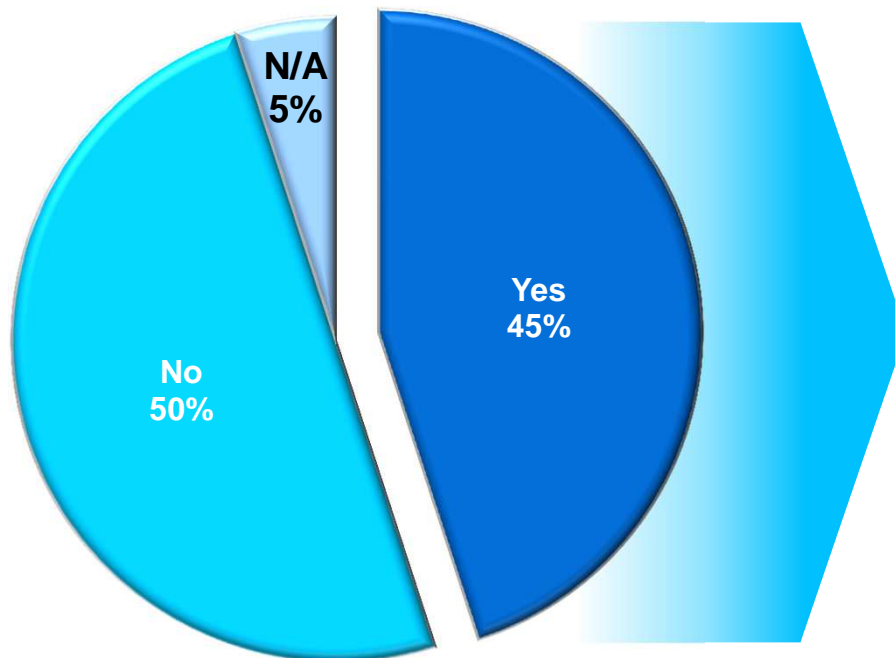


What do you use Twitter for?	% Who Use Twitter for... (n=443)
Broadcasting news and messages	87%
Re-tweeting / Re-sharing content	60%
Engaging stakeholders	59%
Reputation management	45%
Customer service	25%
Informing investors of disclosed information	7%

With the increase in social media's popularity in the world of business, the 2011 Social Media survey included questions about its usage at corporate events.

Social media usage at events

Do you use social media for your organization events?

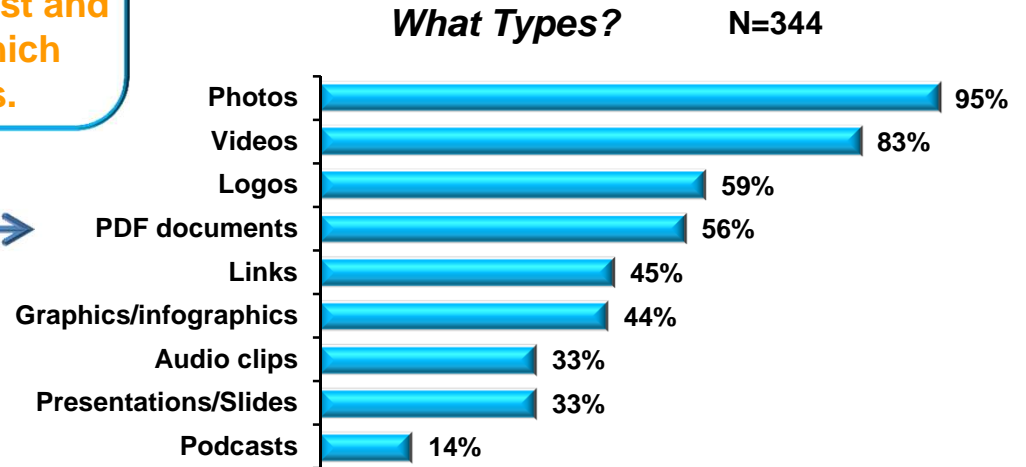
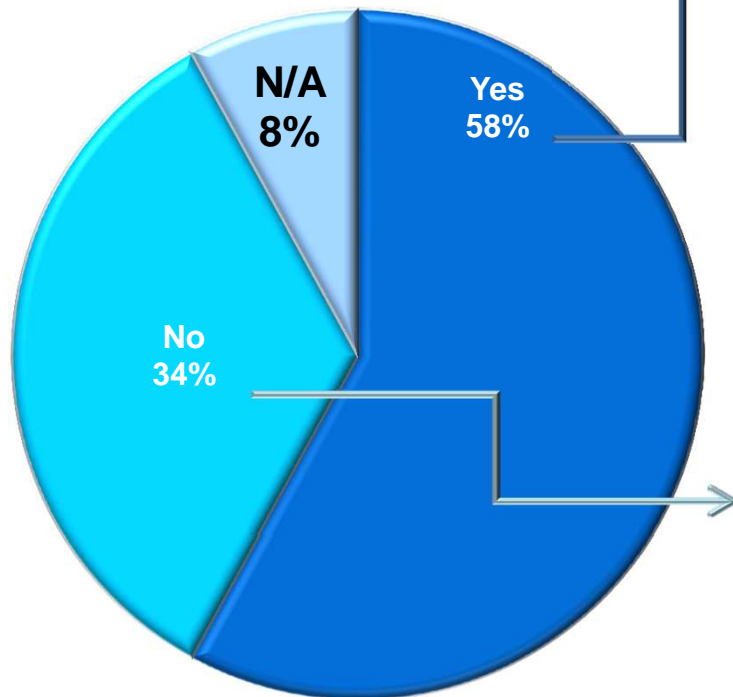


What events do you use social media for?	% Who Use S.M. for... (n=268)
Product Launches	45%
Company celebrations and parties	34%
Annual General Meeting	22%
Town Hall	21%
Events (general mention)	13%
Conferences	9%

Photos and videos are the most common forms of multimedia that accompany news releases. Cost and lack of resources are the primary obstacles which prevent the inclusion of multimedia in releases.

Multimedia Usage

Do you distribute multimedia with news releases?



Why not?	Percent Responding N=198
Lack of resources	28%
Cost/ budget	21%
Lack of skills/ knowledge to produce multimedia	9%
Hasn't occurred to me	5%
Don't know how	5%
Don't have time to produce multimedia	5%
Assets don't get used by media	4%
Too difficult to produce multimedia	3%
Other	15%

Conclusions

- Social Media is the “new normal”
- Has not replaced any channels – it’s simply another one
- PR practitioners are early adopting and consumers are following
- Those who are more engaged have more trust in it as a viable channel

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