

Social Media in Des Moines

A report on Hanser & Associates 2011 Des Moines Social Media Survey

EXECUTIVE SUMMARY

Hanser & Associates' 2011 survey yielded 409 responses on the goals, resources and outcomes of social media activities among central Iowa businesses and not-for-profit organizations. Building on baseline data we created last year, this report highlights the year over year changes for local organizations.

Key findings of this survey include:

- **Growth in adoption may be peaking.** Nearly 80 percent of organizations now use social media and the number of organizations who started in the last 12 months is down 12 percentage points from 2010.
- **Organizations are maturing a bit.** A strategy is now in place for the majority (up 5 points from 2010), as are policies guiding employee use of these tools (+10 points). The number of organizations measuring outcomes has doubled in the past year, but remains low at 48 percent.
- **Resources remain scarce.** Organizations didn't really commit more people to social media activity this year and even 3 in 4 people directly responsible for the work are not devoting more than a quarter of their time. Meanwhile, spending is flat year over year and only 1 in 4 says they will grow their budget in 2011.
- **Social networks still rule.** Nearly every organization is using social networks like Facebook. Use of most other tools is flat, though online forums are down 13 points. Only 1 in 10 organizations use online monitoring tools.
- **Outcomes may be getting better.** More organizations are citing positive changes in customer and media relationships, up 9 and 8 points respectively. And a slim majority now says social media is easier to measure than traditional media and assert their organizations are doing a "good job" with social media.
- **Room for improvement remains.** Four in 10 say their organization's social media activity meets expectations, and 88 percent say social media's value will increase in 2011.

METHODOLOGY

Hanser & Associates 2011 Des Moines Social Media Survey gathered responses in an online survey conducted Dec. 1, 2010 to Feb. 4, 2011. The sample included 409 respondents from central Iowa organizations and matches the marketplace demographics. The sub-sample of social media users totaled 317. This survey has a +/- 5 percent margin of error for each 400 respondents.

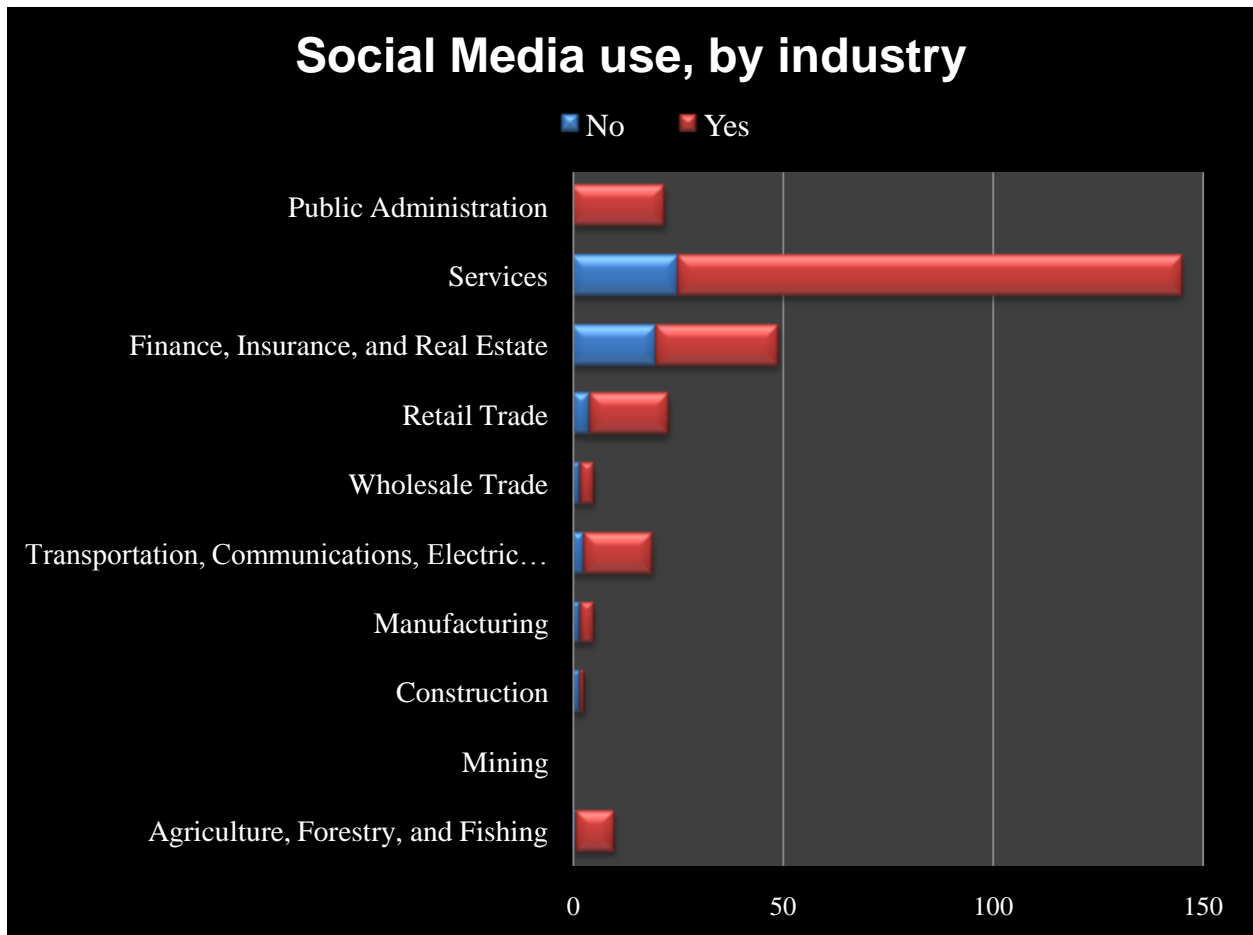
ABOUT HANSER & ASSOCIATES

West Des Moines, Iowa-based Hanser & Associates is a national public relations firm that has supported client's social media needs since 2005. The firm has developed and executed programs (and measured powerful results) for companies who use Web tools to strengthen online and offline relationships with customers, employees and others.

Visit <http://www.hanser.com> for case studies and more information or call Senior VP Ryan Hanser at 800-340-6434 to discuss your social media needs and questions.

RESEARCH HIGHLIGHTS

Hanser & Associates conducted this second annual survey to chart the evolution of social media and its utility for organizations in our home town. Des Moines is consistently recognized as one America's best mid-sized cities, and the metro is home to multiple companies and clubs dedicated to social media. Des Moines is a major center for financial services, healthcare, transportation and publishing. As in 2010, our sample matches marketplace demographics.

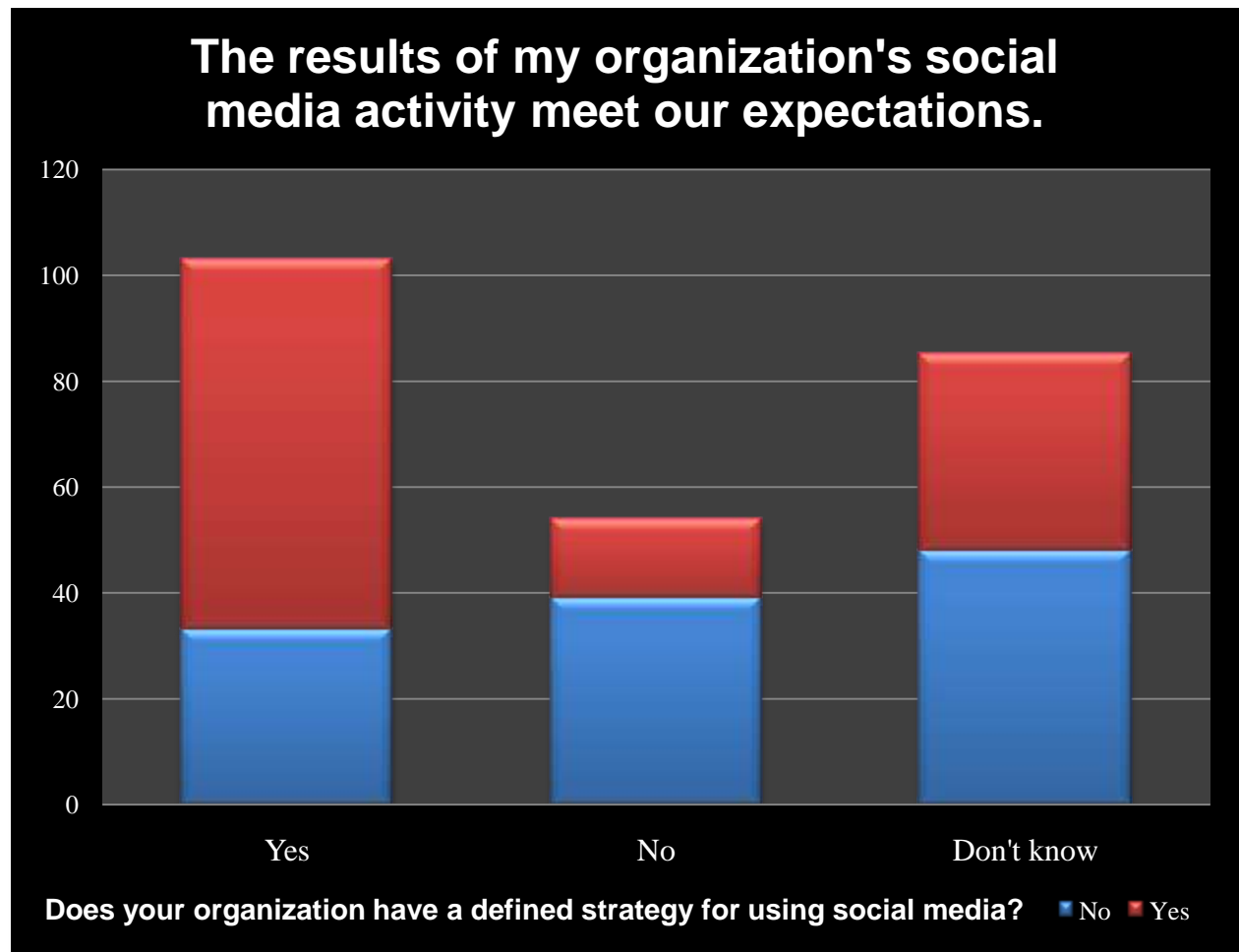


Yes, organizations are getting (a bit more) serious

Social media participation and goals are fairly static compared to last year. Planning and management evolved more substantially.

- 96% say 'generating awareness' is a goal for social media; 'generating leads' is down 7 points
- 50% now have a social media strategy, up 5 points
- 53% have a policy or guidelines for employees using social media, up 10 points
- 52% have a process for responding to relevant online conversation, up 3 points
- 48% are measuring social media; this number doubled in 12 months

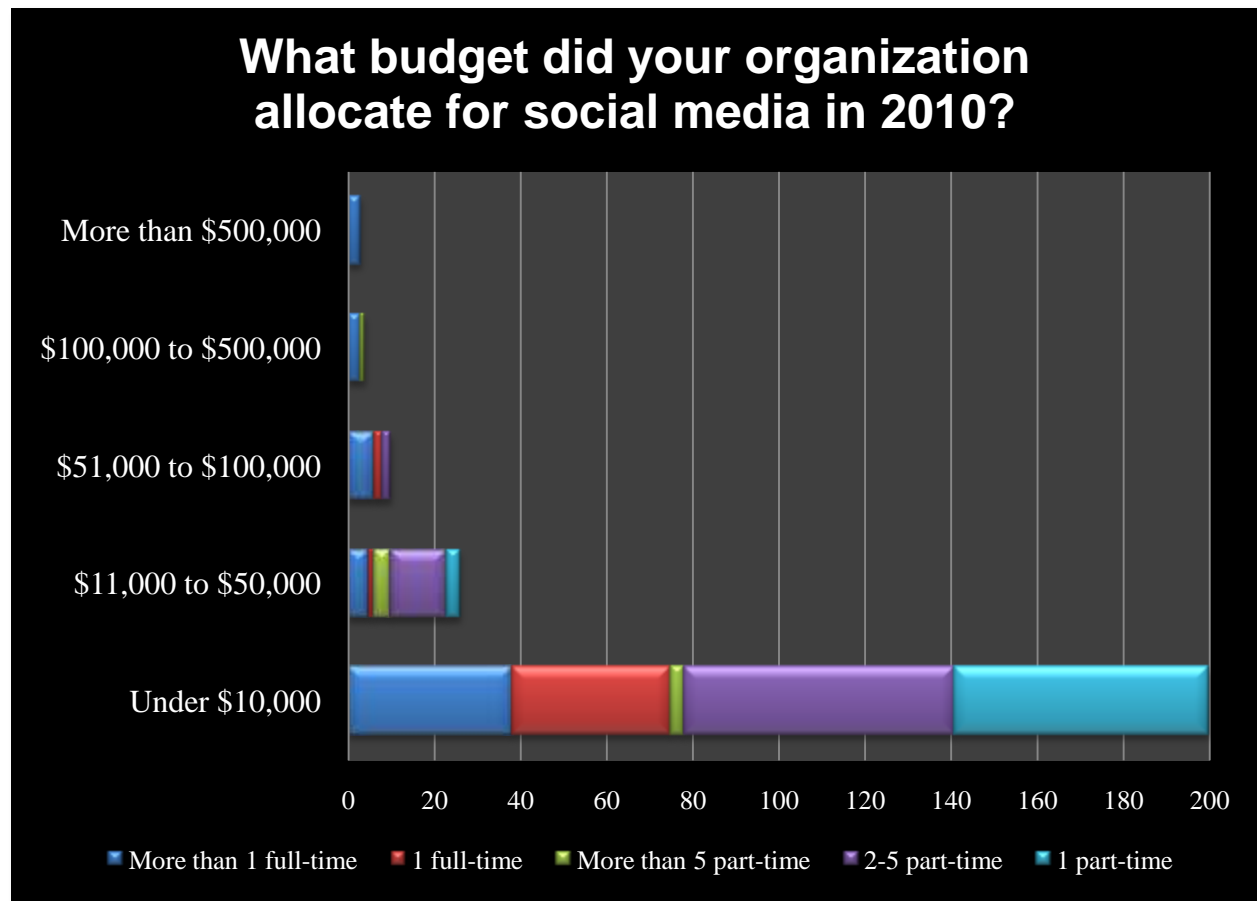
The incremental growth in strategy is worth highlighting because those organizations have better programs.



Yes, 'everyone' is on Facebook

Time and money investments are essentially flat. There are a few more employees using social media part time, and public relations and customer service functions are increasing their involvement. The mix of tools is widening; use of social networks, blogs, and photo/video sharing jumped at least 10 points.

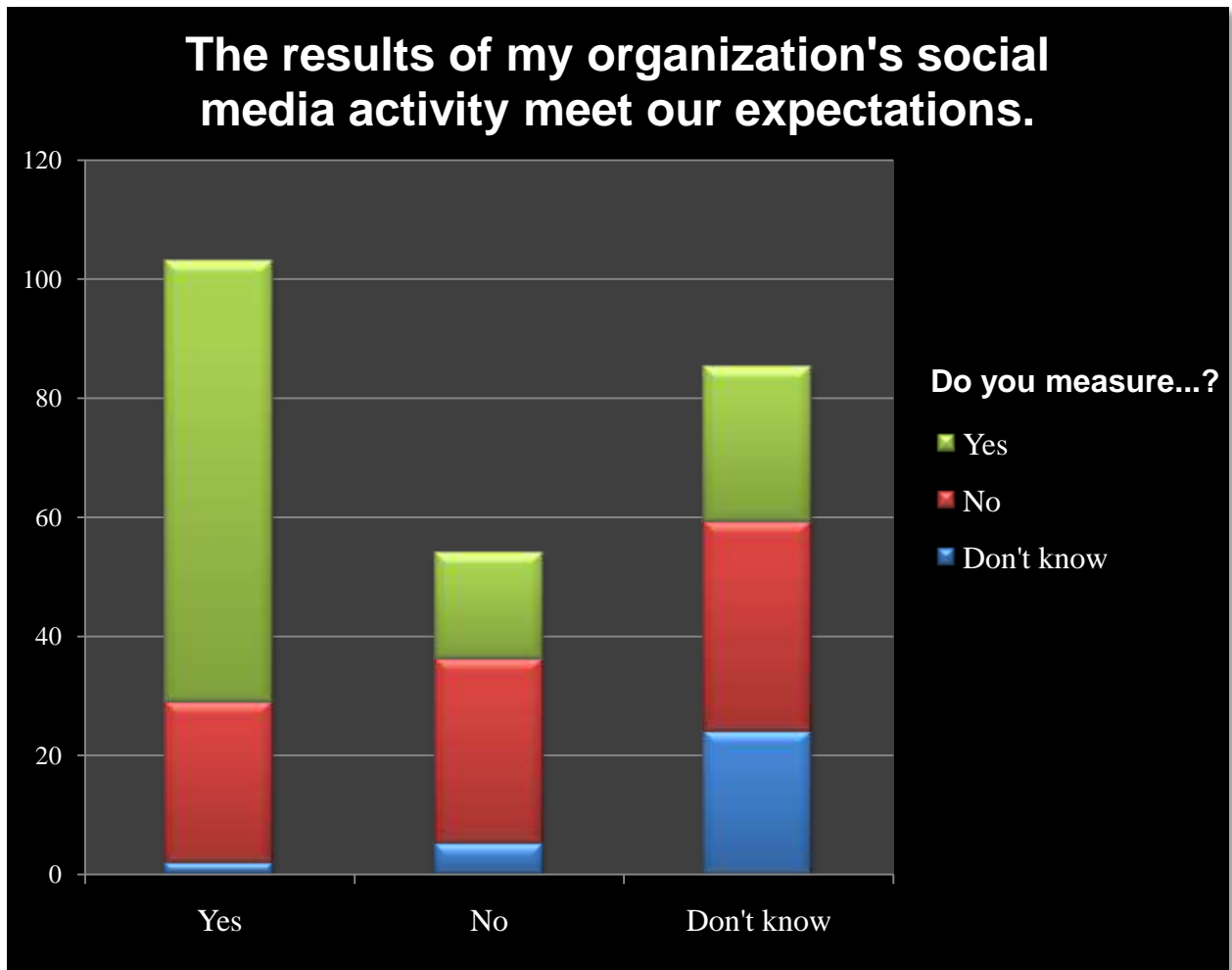
- 39% have staff responsible full time for social media and 36% have more than one person part-time
- 67% say their public relations department is engaged in social media, up 7 points; 19% say customer service is directly involved, up 5 points
- 96% are using social networking, up 11 points; forums and bulletin board are down 13 points; just 10% are using monitoring tools
- 82% allocated less than \$10,000 to social media in 2010, shifting just two points compared to the 22% who said they would increase their budget last year



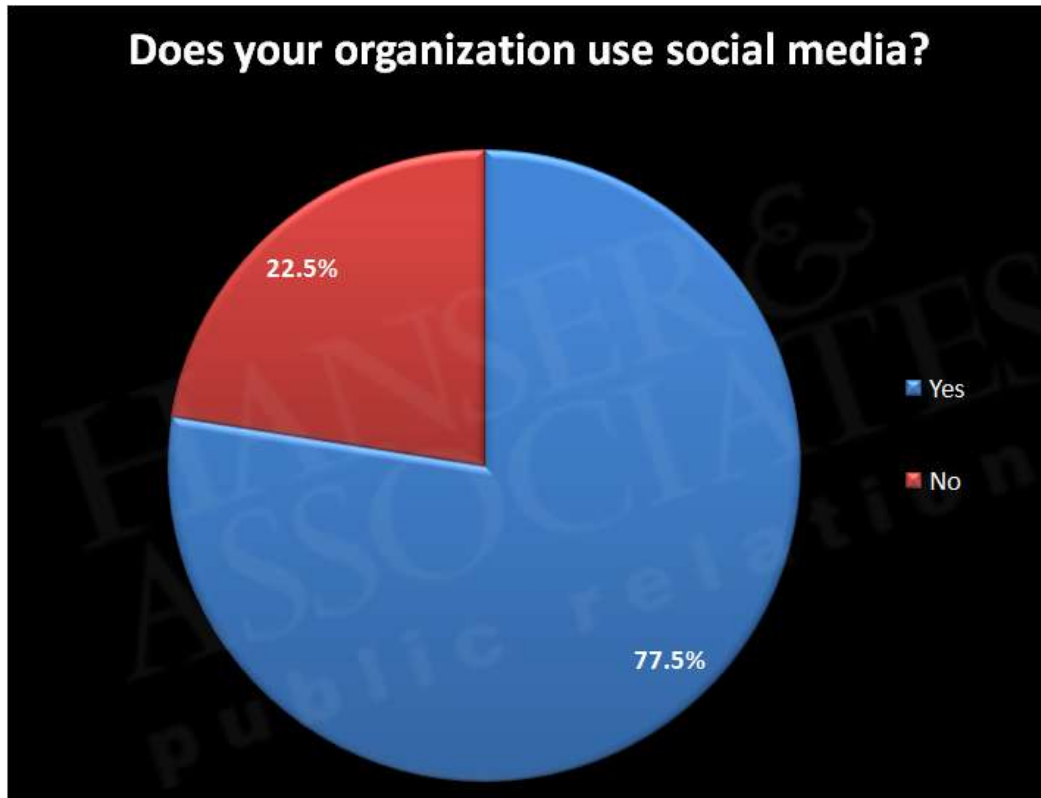
Is it getting better?

Outcomes are getting clearer as more organizations measure their social media activity and report positive change.

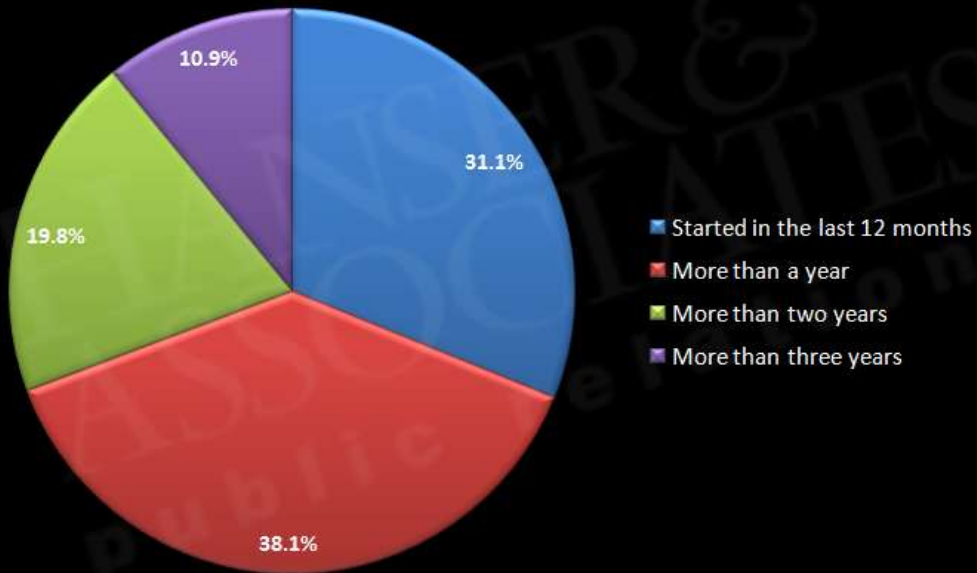
- 89% say social media is worth their investment, up 7 points
- 65% say social media has improved relationships with their customers, up 9 points
- 56% percent now say social media is easier to measure than traditional media, up 18 points
- 42% say their use of social media meets their expectations, up 6 points; 35% don't know if results meet expectations



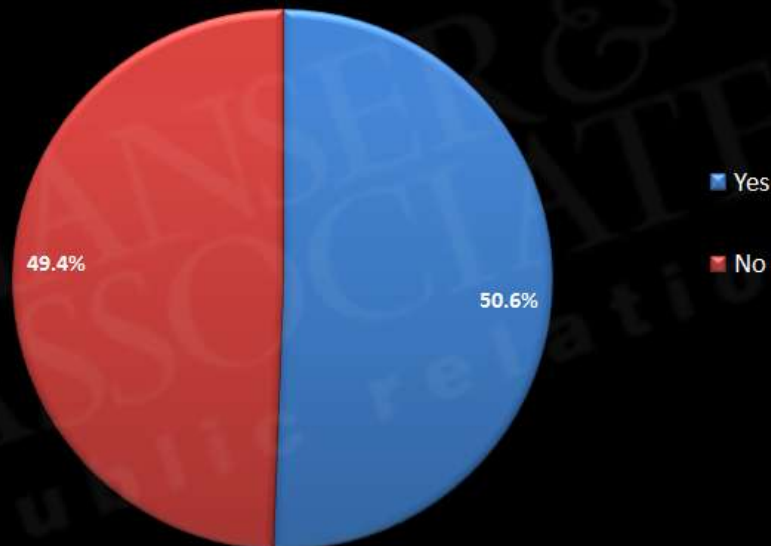
RESULTS



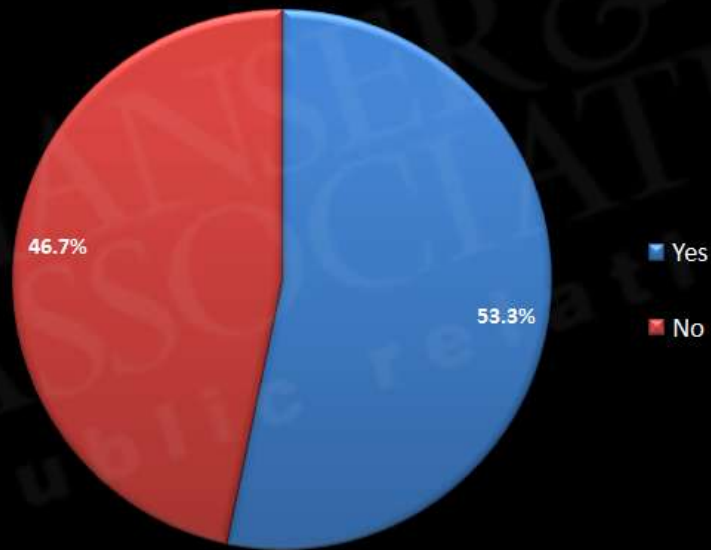
How long has your organization been using social media?



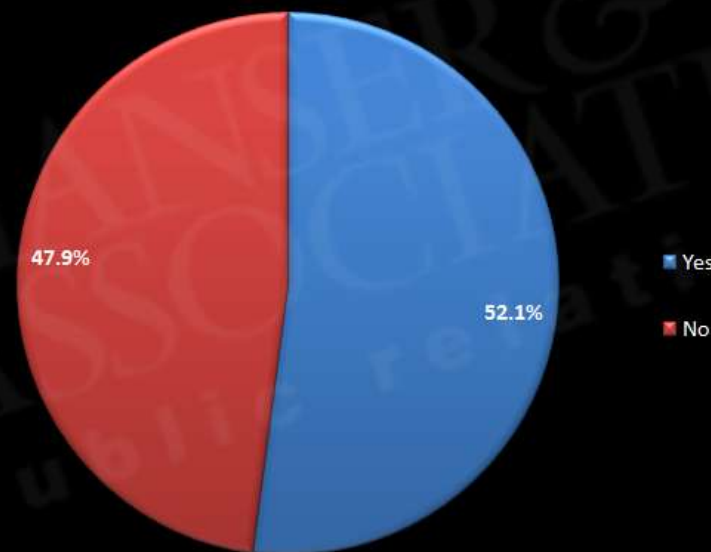
Does your organization have a defined strategy for using social media?



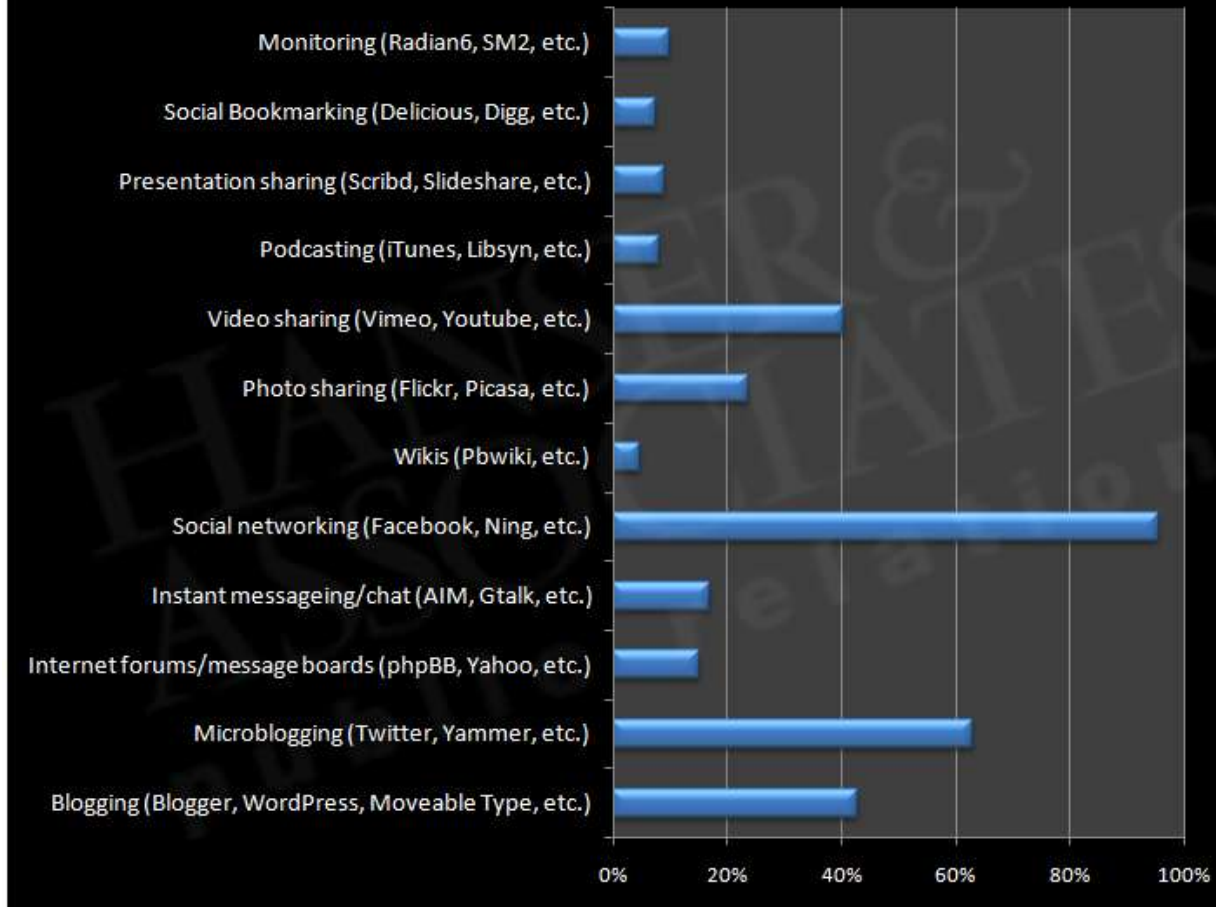
Does your organization have a policy or guidelines for employees using social media?



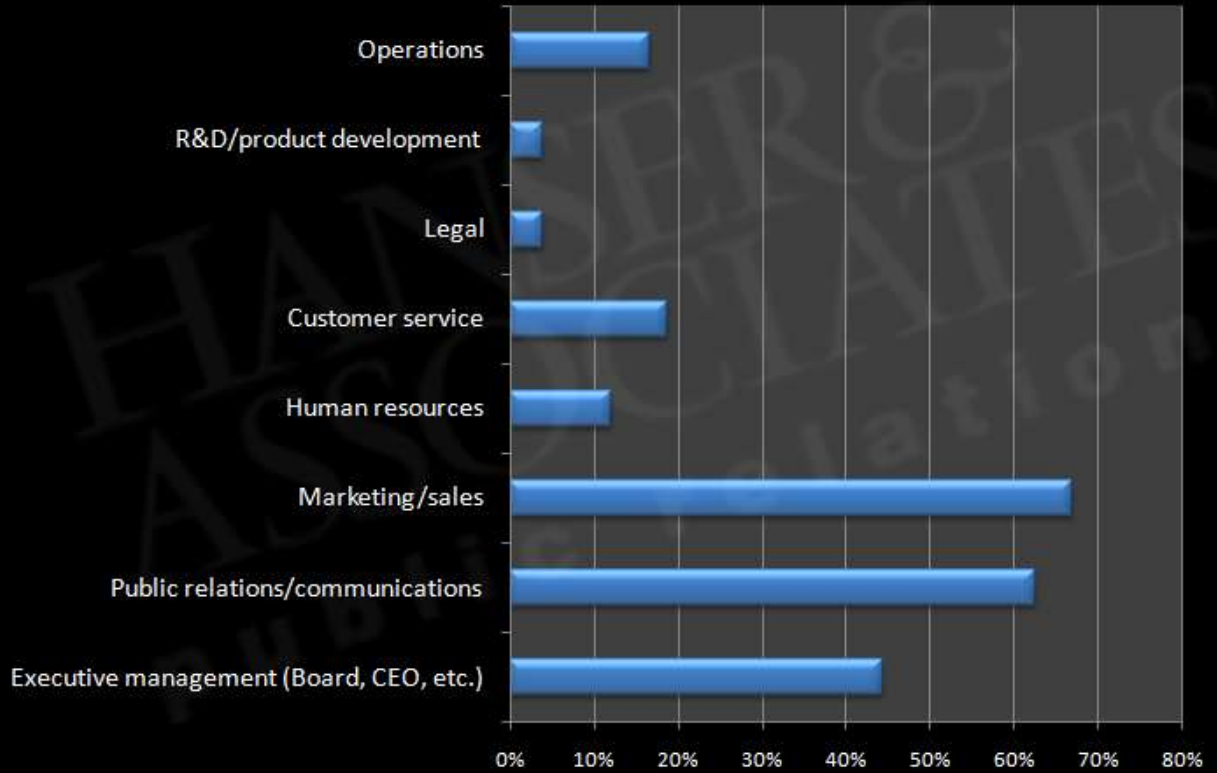
Does your organization have a process for responding to relevant discussion discovered through social media?



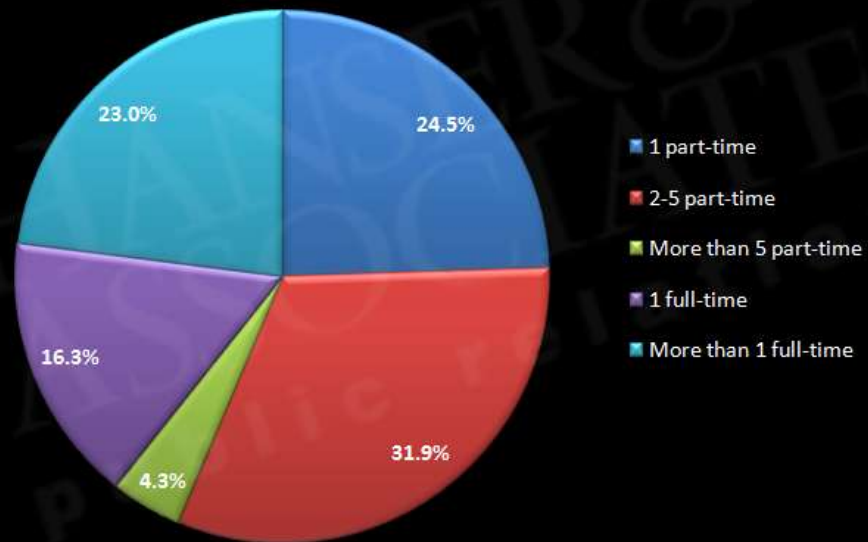
Select all of the following tools your organization uses...



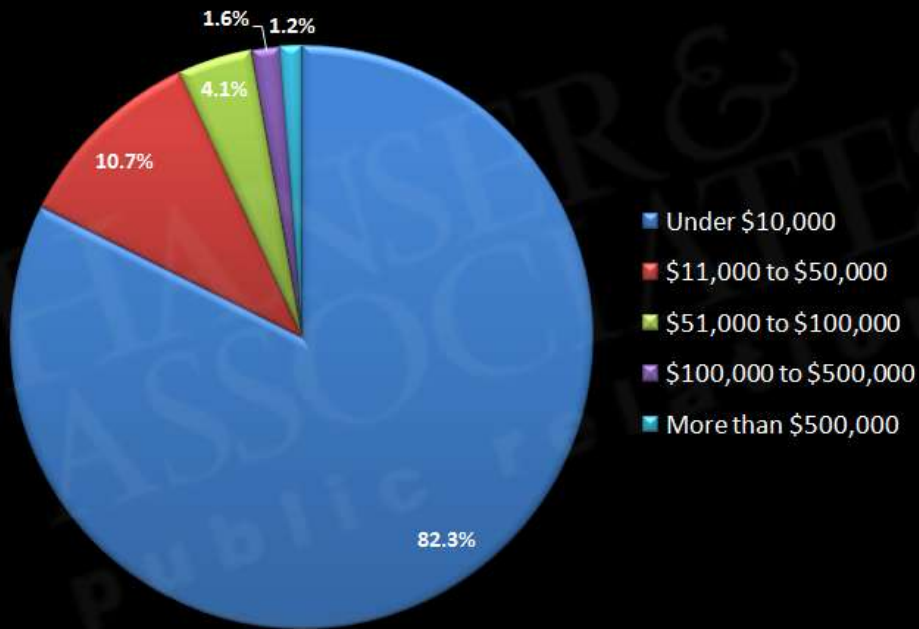
Which of the following departments in your organization are directly involved in social media activity (select all that apply):



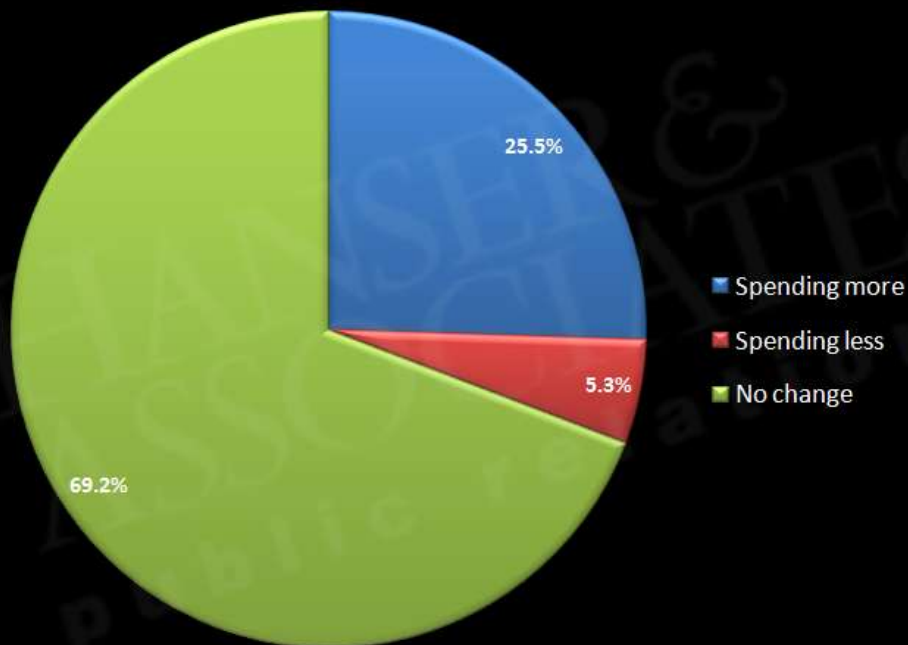
How many individual employees in your organization have social media activity as part of their job responsibilities?



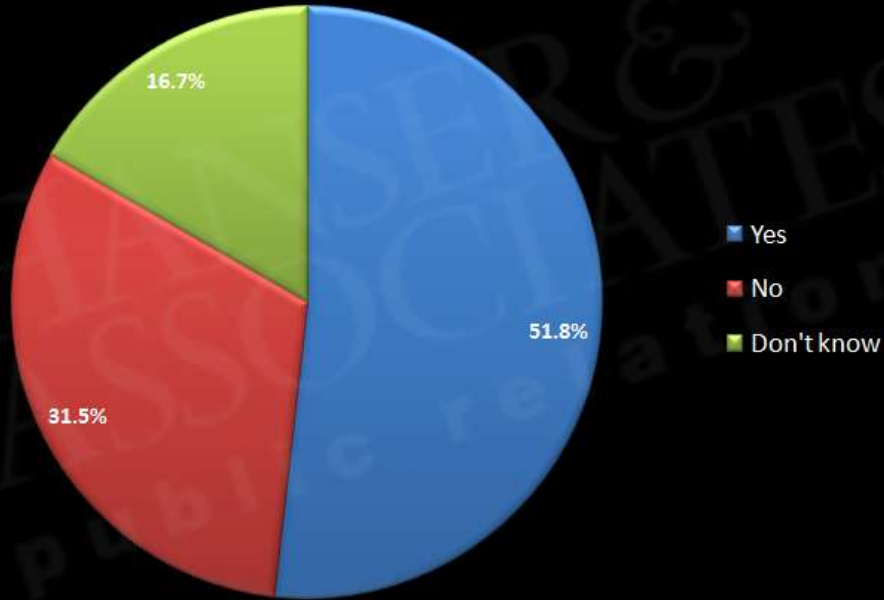
What budget did your organization allocate for social media in 2010?



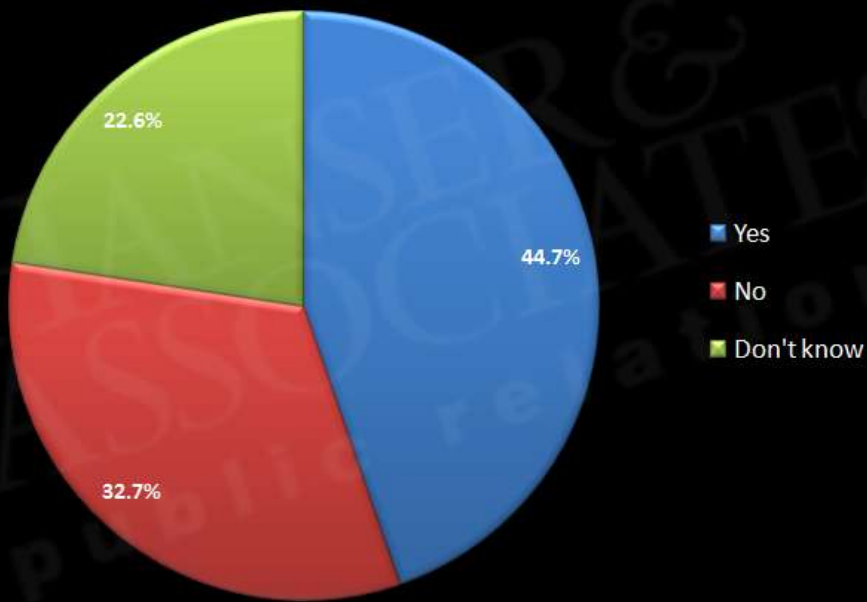
How will your 2011 social media budget change?



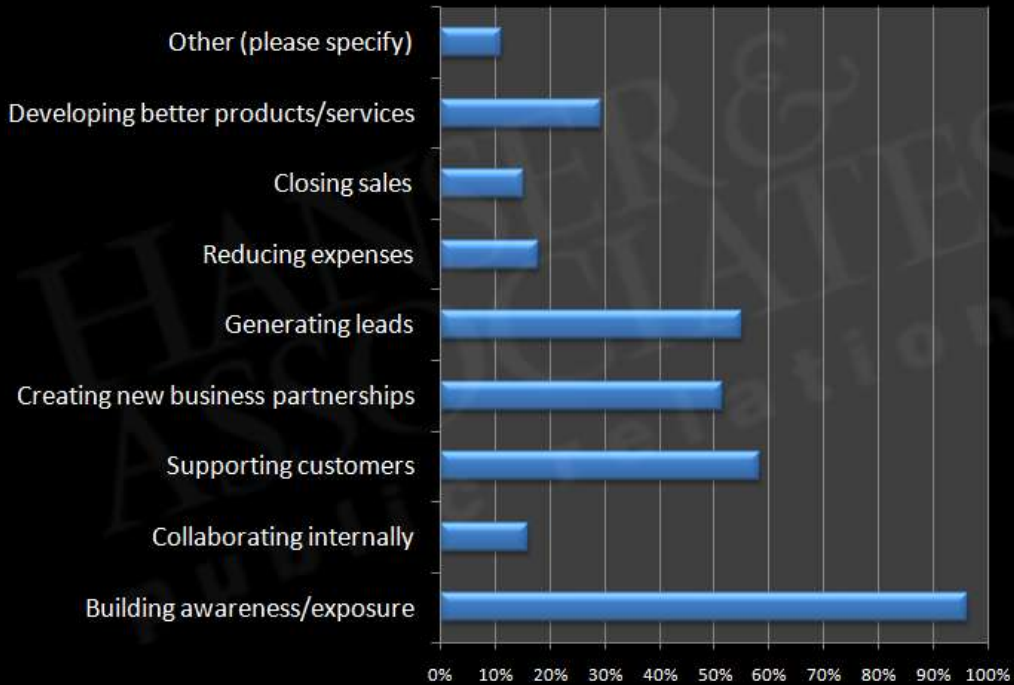
Does your organization have adequate staff and tools to manage social media?



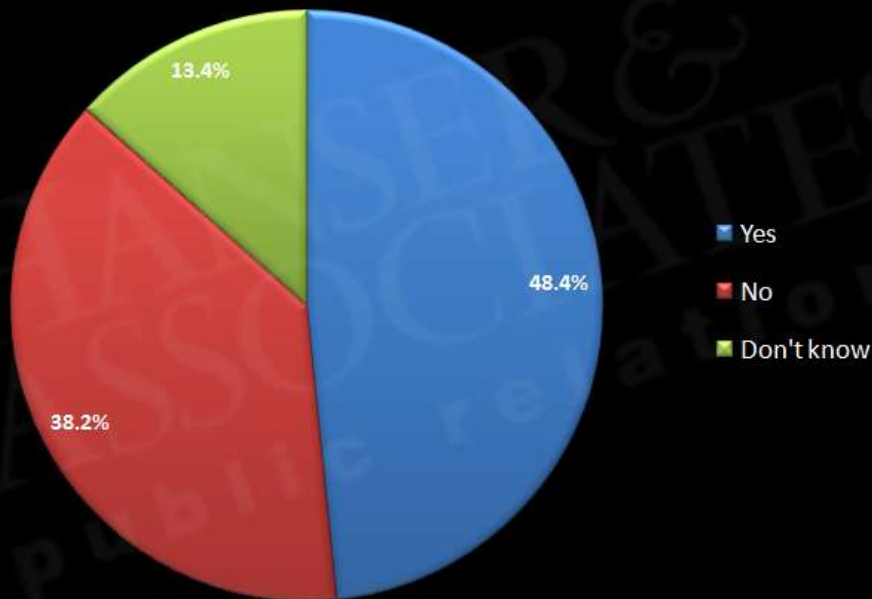
Does your organization need additional expertise in social media?



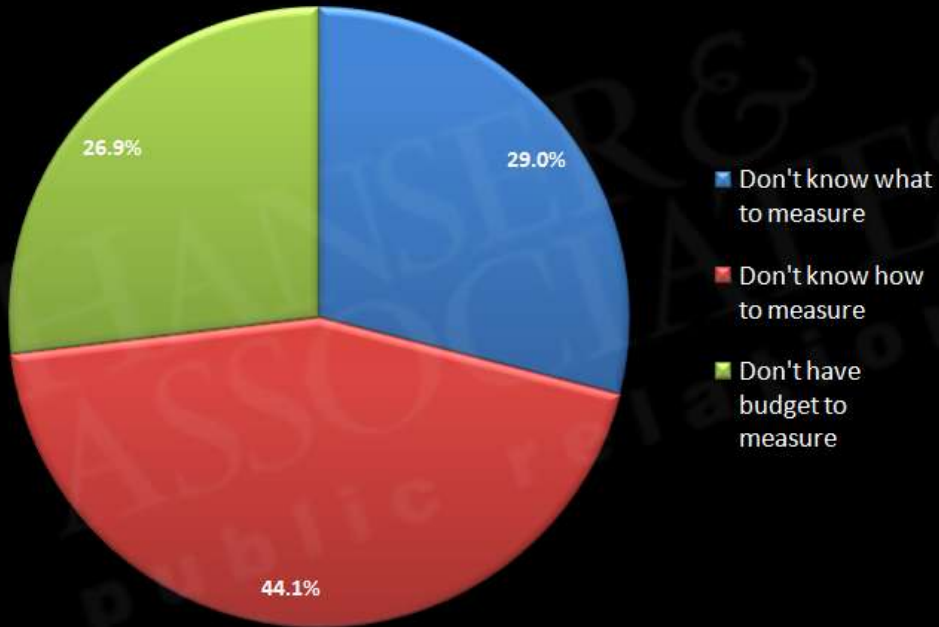
What are your goals for social media (select all that apply)?



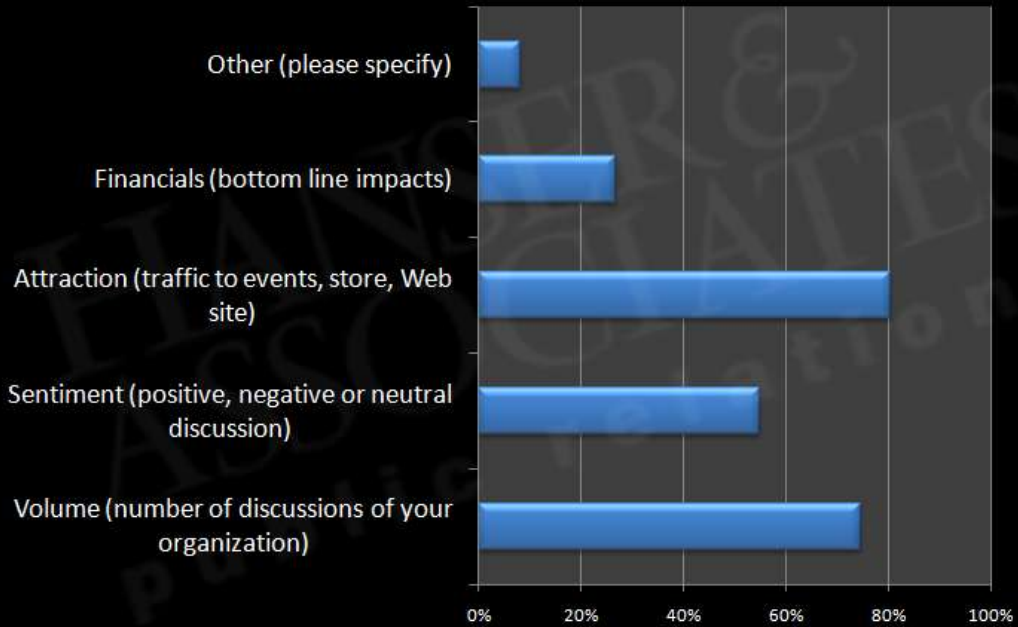
Do you measure the outcomes of your social media activity?



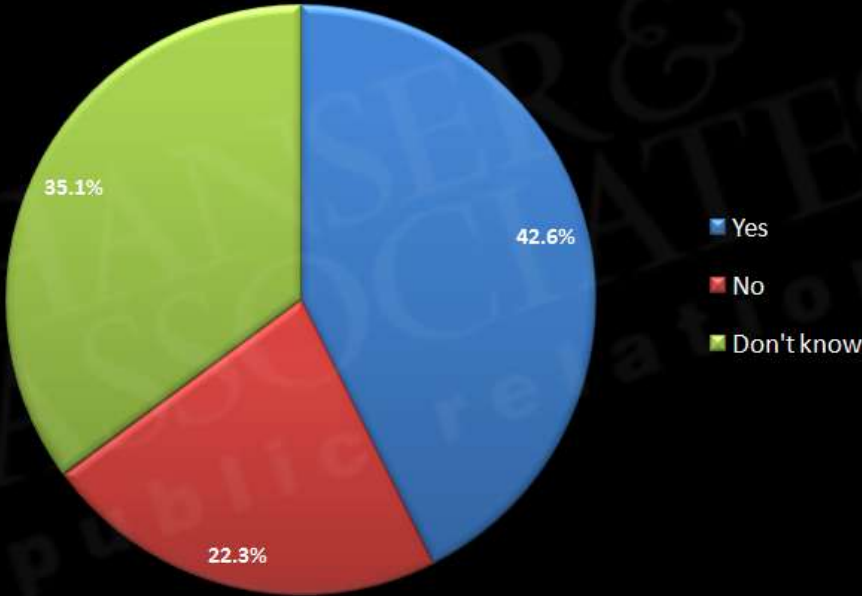
Why don't you measure this activity?



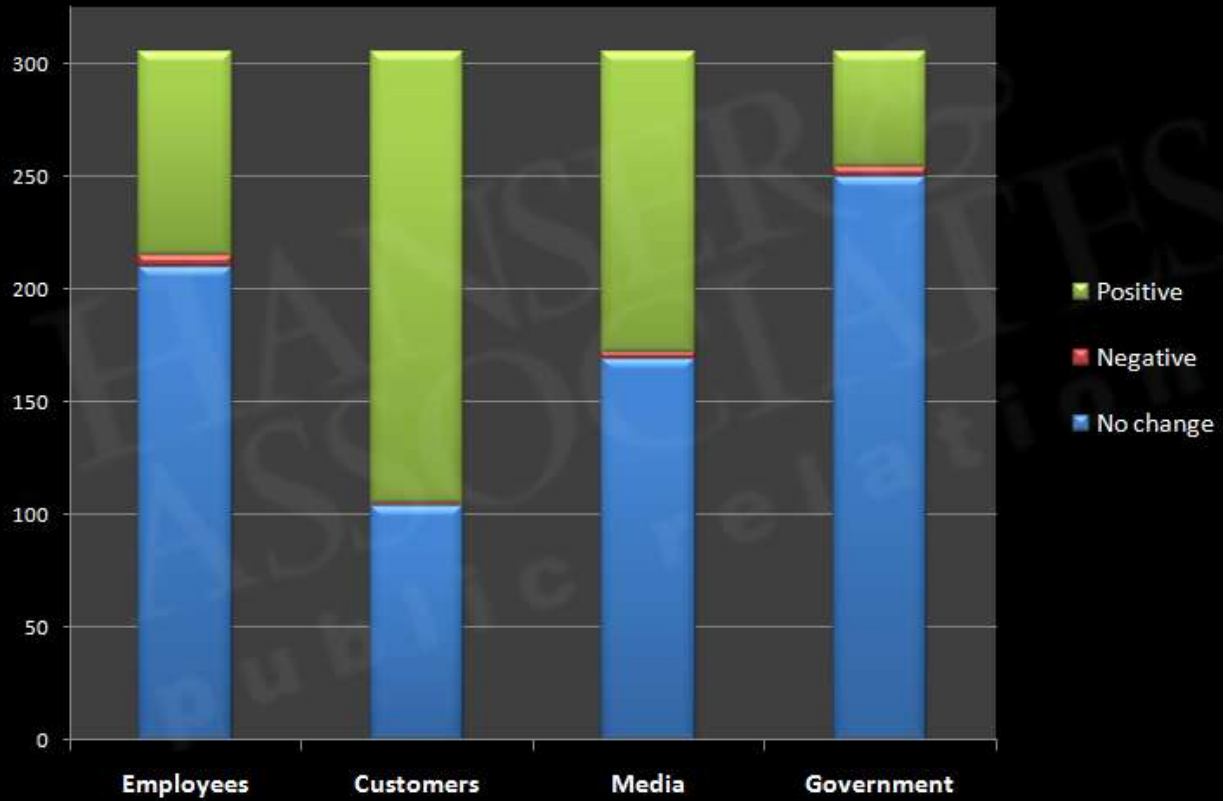
Select all of the following measures your organization uses relative to social media...



The results of my organization's social media activity meet our expectations.

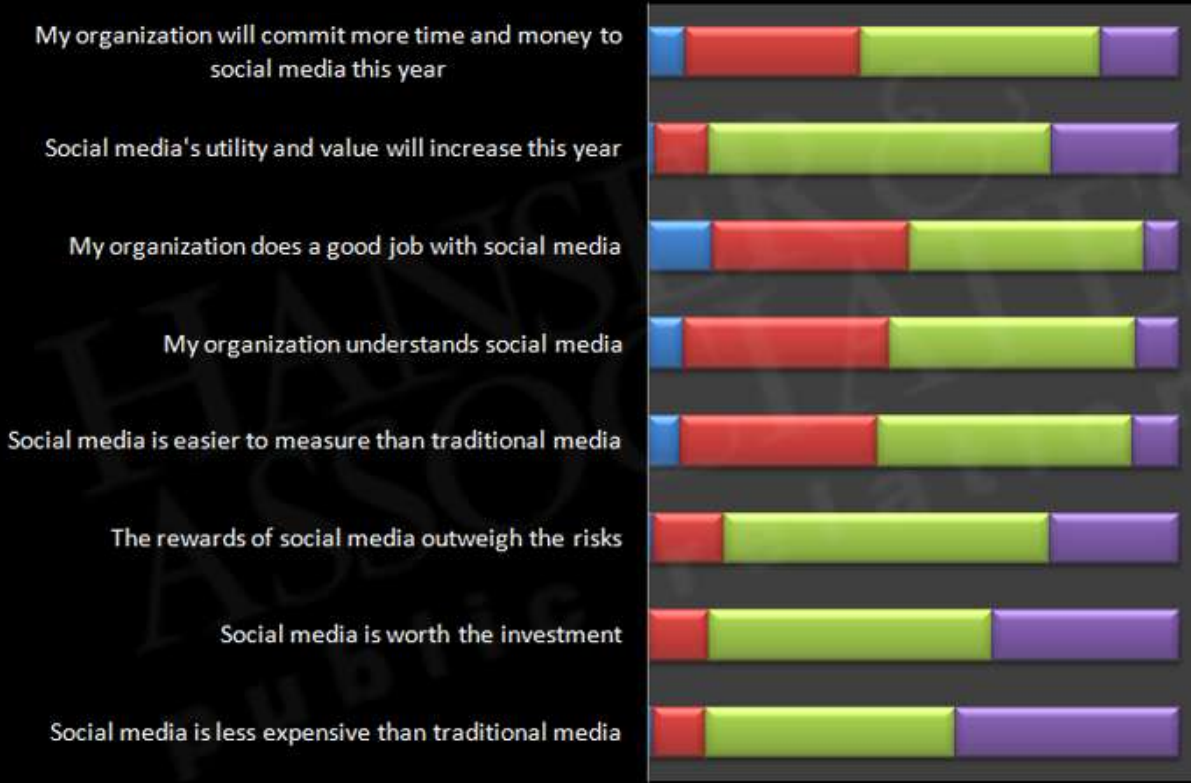


How is social media changing the way your organization communicates with...



Mark your agreement with the following statements:

Strongly disagree Disagree Agree Strongly agree



What do you predict will be the most significant development in social media in 2011?

1. Social media will continue to be more meaningful.
2. More B2B companies utilizing social media.
3. Video and webinars
4. Some people will stop using social media because they find it wastes too much time.
5. Facebook launching an email service
6. More podcasting/videos sent to cust. via email, using actual owner to 'sell' their product by listing how the product can help the client!
7. Not sure
8. User Privacy concerns will increase
9. continued growth
10. more people will be jumping on the smart phone bandwagon and will have immediate and continued contact with their accounts- twitter/facebook etc. They will be connected all the time and be looking for immediate information from businesses. No one wants to wait for answers or information. More businesses will be forced into the social media market or be left behind.
11. The integration of currency and person-to-person exchanges of money.
12. increased loss of privacy
13. We just started using social media tools in October so we are definitely on the learning curve. Don't have a prediction
14. One corporate website supporting the entire organization.
15. Something new will come along
16. More purchasing power through social media - e.g. Groupon
17. phone apps
18. new outposts
19. Privacy and protection of individuals and their information. Possible regulation or prosecution because of Wikileaks releases.
20. don't know
21. Mobile application development seems to be the biggest area for opportunity.
22. I think that people will be moving away from Facebook and looking for more ways to stay in touch with the people they are truly close with, rather than a wider circle of "friends."
23. Push back against tracking tools without users buy in.
24. More payment processing capability and more ability to shop from it.
25. don't know
26. cross selling
27. things like RockMelt making it easier to integrate all internet activity
28. Unknown
29. It will replace email.
30. For me personally, I believe linkedin.com
31. I think eventually we will see a decrease in FB usage because it will be come commercialized even more than it already has someone else will come up with a new idea, etc.
32. Will be used by more people.
33. Mobile Apps
34. Similar to what has happened with many Facebook users, what seemed enjoyable and effective at the start can become an albatross that consumes time without clear rewards. I feel that the same will happen with Twitter and other social media that try to inject business into leisure.
35. It will become over commercialized and desirable consumers will drop it.
36. Unsure
37. The narrowing down or collaboration of the various social media choices. There are already too many taht for a business or customres to fully particpate, learn & take advantage of, it is impossible except for the few where that is their full time job.
38. More involvement from the different departments of the organization.
39. More acceptance
40. More integrated into our daily lives and not as much on the computer.
41. Users will continue to love it while they pretty much ignore the advertisements.
42. more mobile applications and devices
43. blogging
44. Overload of social media outlets and opportunities. We'll go back to hand written letters.
45. As we did our year-end review, we realized one of our biggest weaknesses in social media was lack of time/effort to track results. We've already committed to making that a high priority in first quarter of

- 2011.
46. Much broader acceptance and there will be some dominance taken by a couple providers.
 47. Younger people and those who are dedicated to our mission
 48. More people and organizations will have their private information hacked.
 49. convergence of platforms and increased mobile usage
 50. more convergence between the social media tools
 51. More ROI tools for measurement
 52. More opportunities to manage various outlets from one source. Integrated management tools should simplify social media efforts for smaller companies who cannot allocate someone to do this full time.
 53. Will have some government oversight and become more common.
 54. Location based advertising, check-ins and expansion of brand engagement on Facebook.
 55. The return to meaningful group connections. Not just tweeting to the ether but connections to an audience or group. I will be looking for a way to connect people that I am connected to in a more meaningful way to form better collaborations and develop more of an audience.
 56. Social deals (groupon, living social, FB places)
 57. My mother-in-law will stop trying to friend me on FB.
 58. Twitter accounts will increase.
 59. Don't know
 60. Don't know.
 61. More commerce through social media.
 62. Facebook will go public.
 63. Increase use of twitter and marketing efforts directly to smart phones
 64. Facebook account
 65. I have no idea
 66. Video "Facebook"
 67. More businesses engaging with their clients.
 68. better business application, less resistance...
 69. Again, organization as a whole does not actively promote all aspects. Therefore my area is left out of the social media.
 70. I don't know that this will be the most significant, but I do predict that more and more businesses/organizations that previously thought they were not impacted by social media will change their minds.
 71. More clicks-more interest
 72. People using their budget for traditional advertising and moving it to social media.
 73. use of tools such as 4 square to check in locations and give discounts. Also the use of quick link boxes people can scan to get me info.
 74. Companies large and small will continue to offer insipid "social media consulting" at a very large fee. Businesses, eager to jump on the bandwagon but too lazy to spend a few hours to learn the culture, will continue to make half-hearted attempts at embracing -- and strategizing -- an ever changing and informal medium.
 75. Will lose credibility, degrade the sense of responsibility of the user, become a home of opinion, subjective views, and be worthless for meaningful communication.
 76. more social networking, less email. More videos being used
 77. Not sure if there will be a change or not
 78. The ability to use multiple social media sites at once or at the very least, send out information to more than one at the same time.
 79. Creation of more call to action driven marketing campaigns
 80. More guests will join my LINKED IN and Facebook.
 81. I am not sure as this is handled by our marketing department
 82. Scope of devices that connect to SM
 83. Not sure.
 84. For our company, Facebook customization features and allaboutme.com also using wordpress plug ins more effectively to enhance our graphics
 85. twitter will become more popular...the new facebook!
 86. Continued integration of all marketing channels with Social Media being more prominent among consumer marketing than business to business
 87. duno
 88. Unknown
 89. More people will be familiar with it and using it.
 90. ?
 91. MySpace and Facebook changes
 92. no clue but I would hope

there would be a discussion of ethics in this market

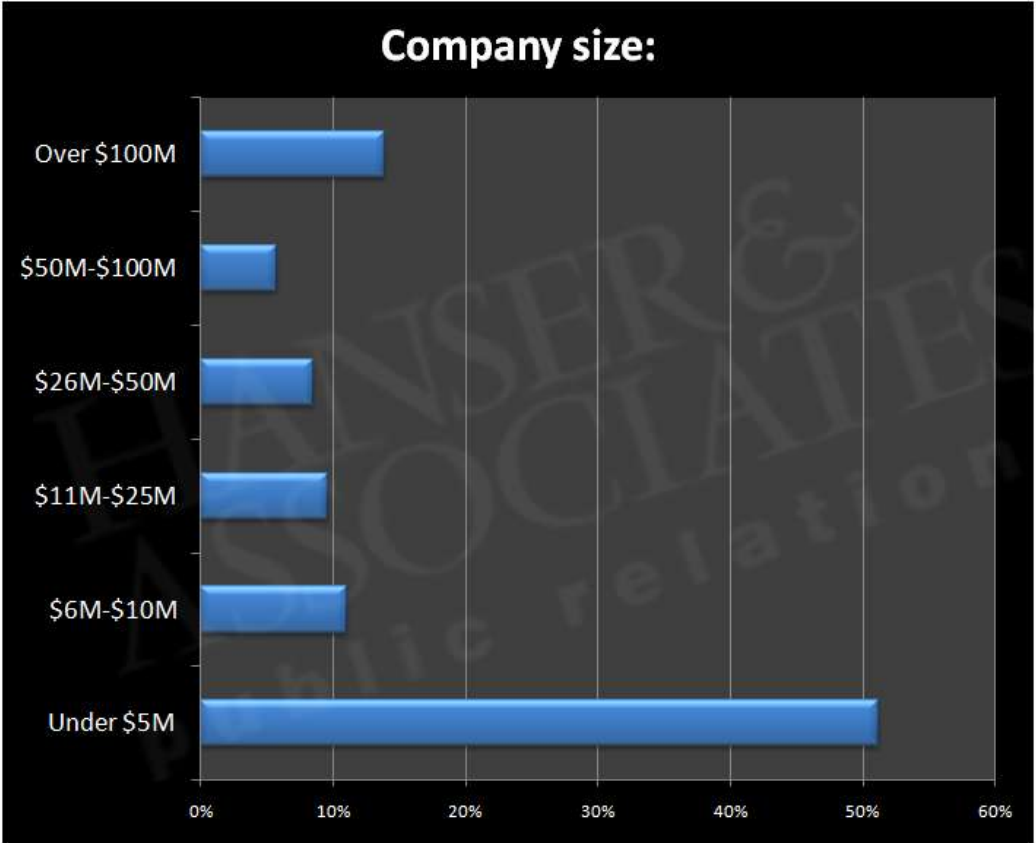
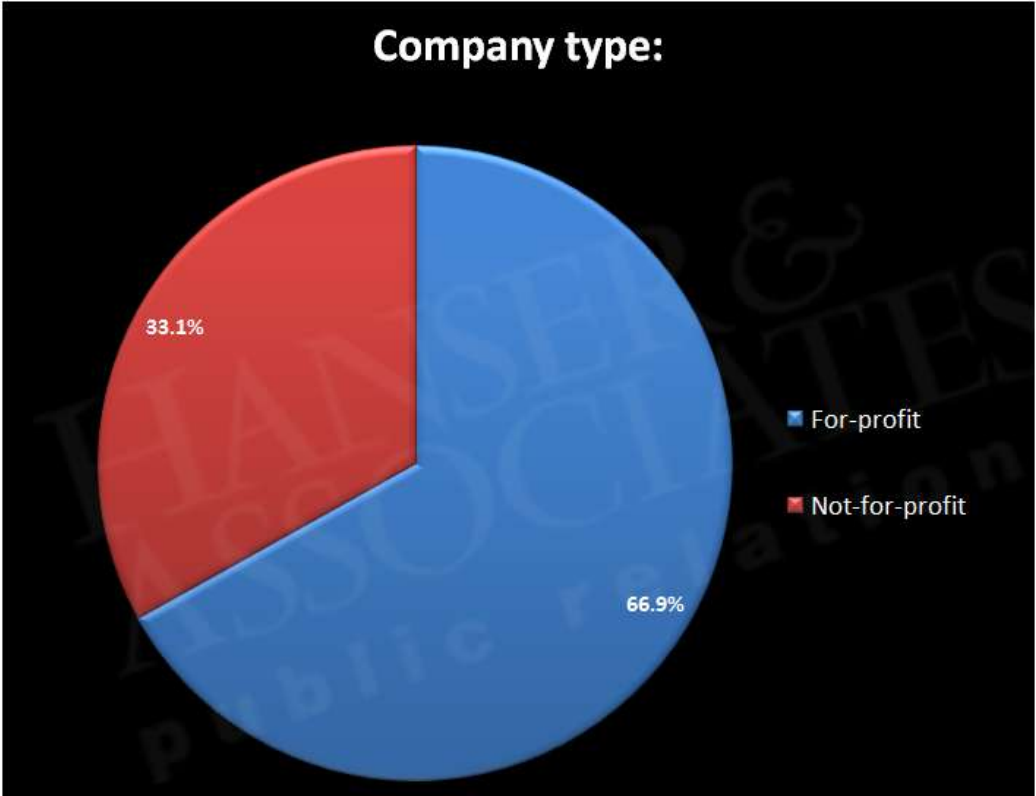
- 93. more sales associated with social media
- 94. More ... retirement communities will develop Facebook pages.
- 95. More sites to use.
- 96. More and more of the people who didn't "get" social media before, will finally have caught on. Those that already have the business expertise in their field will likely feel they no longer need the social media specialists

to stay competitive in their field. It will be a year of sink or swim for social media specialists, they will have to keep learning and staying ahead of the curve, when innovation may start to lag.

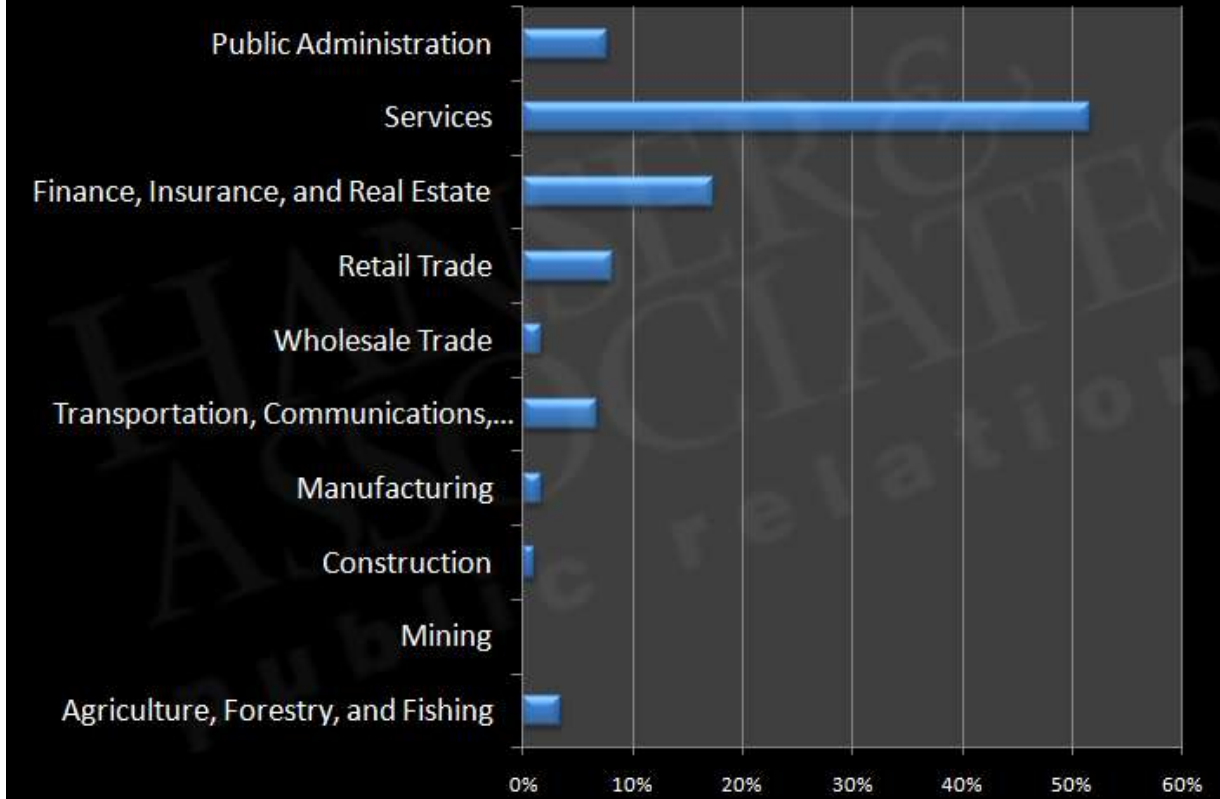
- 97. Continued demand for ROI overall, increased use of apps and other tools specifically.
- 98. Facebook will still be the dominant channel. I expect a new type of social media channel will emerge and become a popular tool. Meaning,

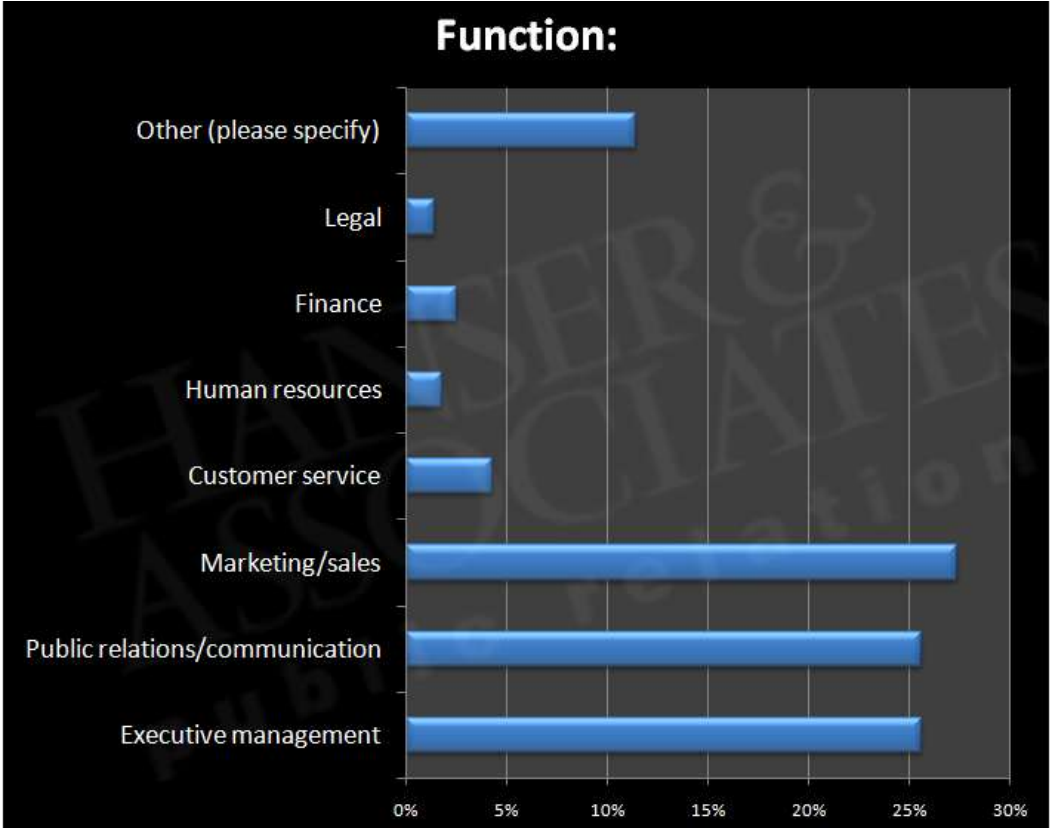
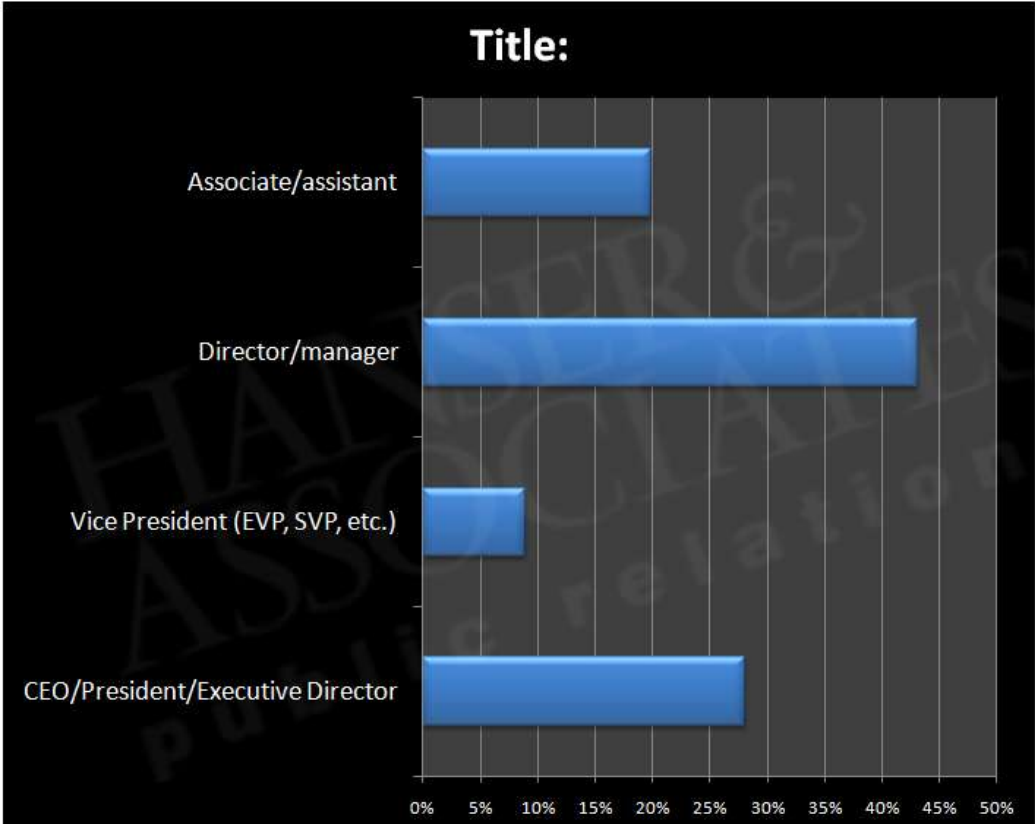
something like FourSquare will hit the landscape and have immediate influence.

- 99. No opinion
- 100. More users than before

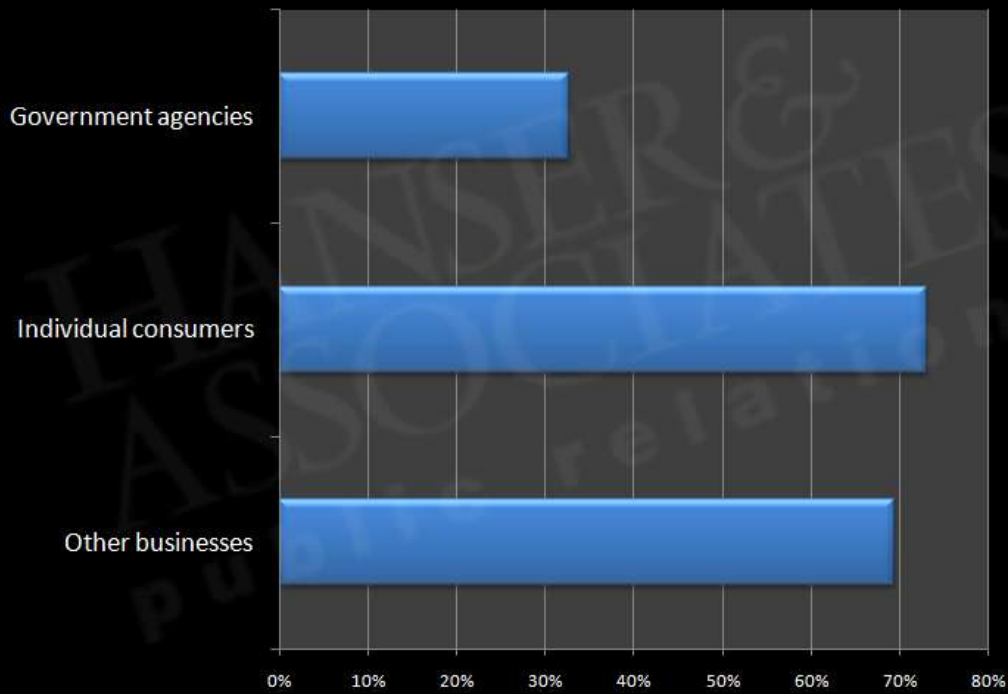


Industry (defined by Standard Industrial Classification codes):

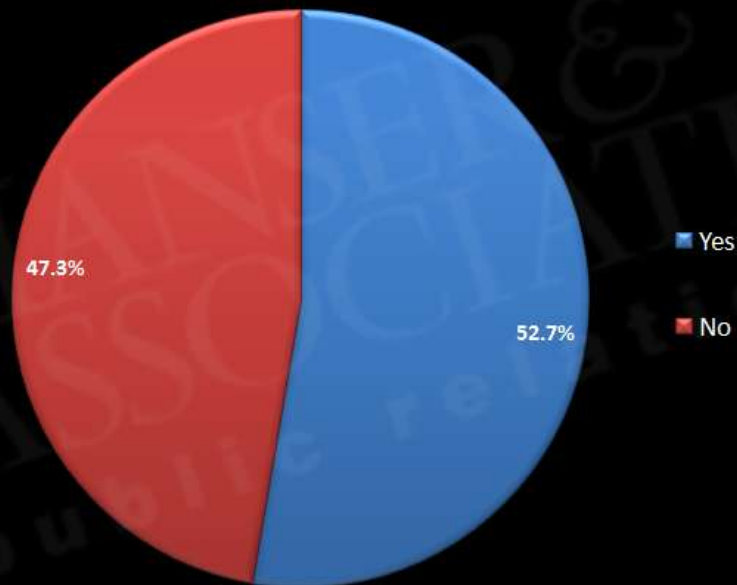




My organization's customers are (select all that apply):



Are you the person directly responsible for social media in your organization?



How many hours per week do you personally spend using social media for your organization?

