

# **Social Media within Public Relations**

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**A quantitative survey into client-side  
adoption, attitudes and opinions**

**harvard**

*Lots of talk, and some action –*  
the reality behind intense media coverage is  
that one in eight PR teams are actively embracing  
social media communications channels as a  
mainstream activity

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*Early adoptors –*  
US companies lead the way in exploiting  
new social media opportunities;  
those with a b2c proposition are also ahead of the pack

•

*RSS marches on –*  
over a quarter of PR departments  
are now employing RSS feeds  
as part of their media relations activity

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*There may be trouble ahead –*  
one in five have suffered damage from blogs;  
of the rest, three-quarters have yet  
to put in place procedures to protect themselves

## Introduction

Social media has become one of the hottest topics in PR, with advice pouring out continuously from industry publications, gurus, commentators and, of course, blogs. The 'traditional' mainstream media too, have been having their say, reporting on the rise of the blog, comparing online readership figures to that of print media and mulling over the impact of the switch of advertising spend to the online world.

Indeed, doyens of the traditional media world have been queuing up to add their voices to the cascade of opinion on social media's expected impact. From Rupert Murdoch's slightly apocalyptic, "It is difficult, indeed dangerous, to underestimate the huge changes this revolution will bring or the power of developing technologies to build and destroy," to the more measured tones of the BBC.

Richard Sambrook, Director of BBC Global News, has led journalists in saying that the effect of social media (also known as social computing), citizen journalism and consumer generated content, including blogs, is to radically redefine the role of traditional news gatherers. As he put it: "we don't own the news anymore."

Research firm, Forrester defined social computing as "a social structure in which technology puts power in communities, not institutions," and says that organisations "must abandon top-down management and communication tactics, weave communities into their products and services, use employees and partners as marketers, and become part of a living fabric of brand loyalists."

A couple of pertinent figures demonstrate the size and growth of the marketplace: over the past couple of years, the number of blogs has doubled every six months and Technorati, a blog search service, currently tracks over 55 million blogs.

The simple message that is being conveyed is that everyone, corporations especially, needs to start taking blogs and the whole social media scene seriously. How companies should go about this has not really been examined, nor has the extent to which these messages have translated into action. Are corporations really taking this seriously? If so, which ones, and why?

As with any new service or product (especially within the tech space) we'd expect to find a bell-curve distribution with a few early adopters blazing a trail for the majority, and most of the rest waiting for someone else to make a move. So, where are TMT PR practitioners on that curve, are we at the bleeding edge, or is social media already mainstream? How does your stance compare with that of your peers – are you an early adopter or a laggard?

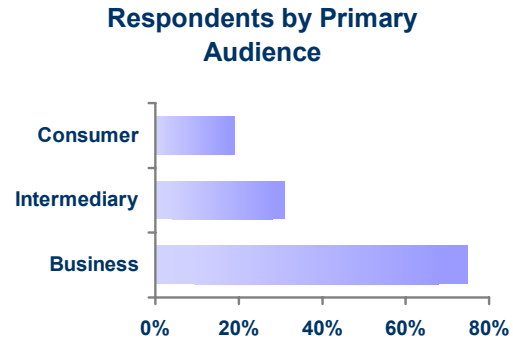
To find out how active companies are, or plan to be, in the context of social media, Harvard undertook a survey among companies across the spectrum of Technology, Media and Telecoms. Questionnaires were sent via email to organisations in the UK, EMEA and North America. Responses were received from 77 contacts in PR and marketing roles.

## Context of responses

To put the findings in context, we asked respondents about their primary audiences, whether external communications/PR consultants are used and their annual PR spend.

### Primary audience

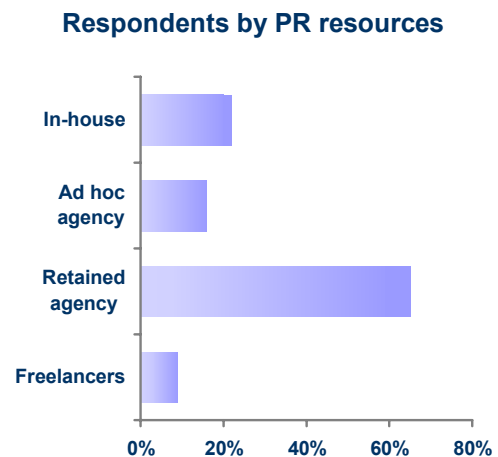
Three-quarters of respondents have business end users as their primary audience; nearly one-third (31%) are targeting business intermediaries such as channel partners; while 19% have consumers as their primary target. (Total is above 100% due to multiple mentions)



### PR resources

We asked what access respondents had to a communications/PR consultancy. Nearly two-thirds (65%) stated that they have a retained agency while 16% turn to agencies on an ad hoc basis and 9% use freelancers.

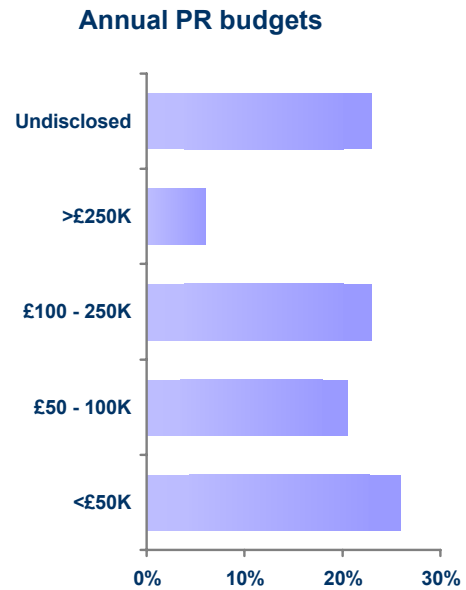
On the other side of the coin, just over a fifth (22%) said that all marcoms and PR is undertaken in-house.



### Annual PR budgets

There was a fairly even split among those companies with budgets below £250,000: 26% stating an annual spend of below £50,000; 21% outlaying between £50,001 and £100,000 a year and 23% committing £100,001 – £250,000 to PR funds.

Only 7% of companies declared a budget of over £250,000. 23% of respondents declined to reveal their budgets.



## Approach to Social Media

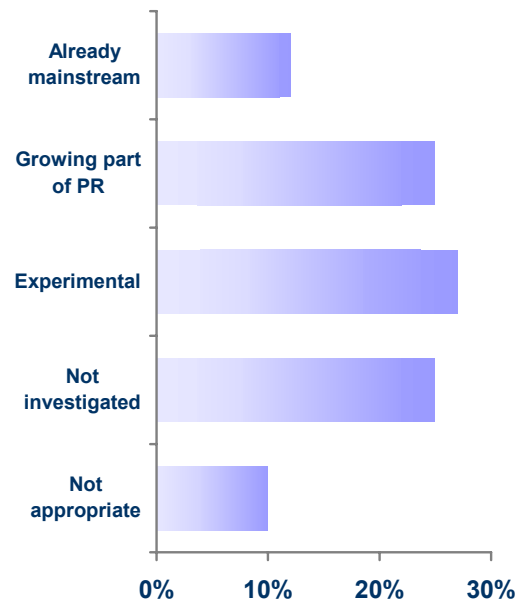
The questionnaire opened by asking “How would you describe your approach to social media (e.g. blogs, wikis & online communities)?” Although the answers throw up a mixed picture, this is perhaps only to be expected from a media which is still in the embryonic stages.

While 26% have “not really investigated it properly”, another 27% are experimenting with social media and 25% say that it is a growing part of their PR function. Ahead of the pack are 12% who report that social media is already a mainstream aspect of their PR function. At the other end of the spectrum, 10% say that they don't think it is appropriate for their company.

The key finding that springs out of this chart is how closely this data matches a standard (Geoffrey Moore) adoption curve. As we would expect, our innovators have already moved through the ‘experimental’ and ‘growing part of PR’ phases and now regard social media as mainstream.

However, although the early adopters are quite advanced – 25% of respondents commenting that social media was already a growing part of the PR mix and 12 % already moving it into the mainstream – significant numbers are only experimenting or have not even investigated social media. Ten per cent - the laggards – view social media as not appropriate for their organisations.

**Overall approach to Social Media**



So it seems that in the TMT sector at least, social media is being talked about, and some organisations are making serious moves into this space. The greatest adopters of social media are those targeting a consumer audience with over 60% reporting it to be either a growing part or a mainstream aspect of their PR. Also, those companies in the USA are leading the way with 25% (double the average) stating that social media is already a mainstream part of their PR.

It is also worth noting that those companies with agency support appear to be embracing the medium much more quickly. Nearly 40% of those with a retained agency say that social media is either a growing or mainstream aspect of their PR activities compared to 25% handling PR in-house. However, this latter group seems determined to make up ground: 58% of those handling PR in-house claim to be experimenting with social media compared to 36% using an agency ad hoc and 18% with a retained agency. Again, because of the granularity of the data it is dangerous to extrapolate – but it could be that agencies have, to date, been the best way to access resources and skills.

## Usage of online media activities

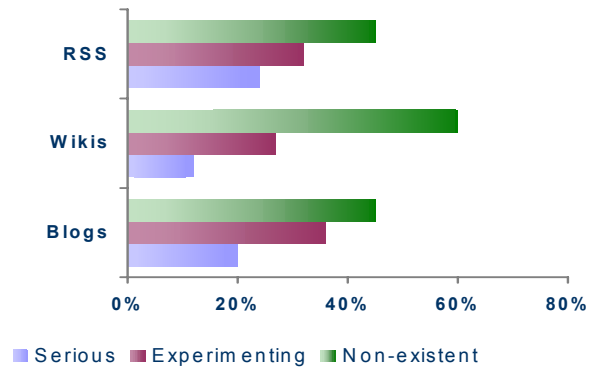
Next, we asked about the respondents' current approach to blogs, wikis, and RSS and the likelihood of them adopting these technologies over the coming 12 months.

### Blogs

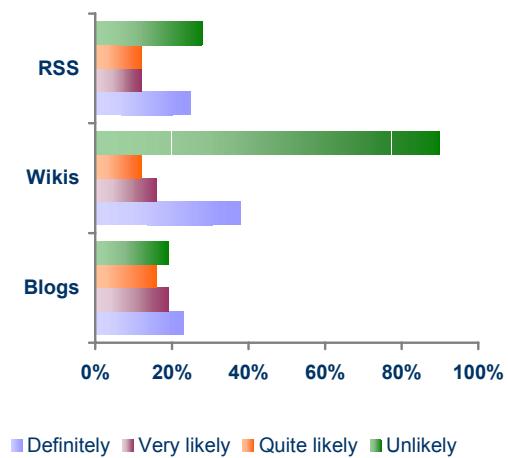
Weblogs, commonly called Blogs, are perhaps the most widely understood element of the social media space. They give individuals the ability to quickly and easily write, edit and publish content online.

An industry 'rule of thumb' is emerging which suggests that 89 per cent of social media participants are merely consumers, 1 per cent write and create their own content and 10 per cent post comments on other people's sites. With this 89/1/10 rule in mind, the fact that one-fifth of our respondents claim to be taking blogs seriously, and more than one-third (36%) are experimenting can be seen as significant. This does leave a notable 45% yet to take the plunge, the majority of whom (62%) report that they are unlikely to change their ways in the next 12 months, compared to just 3% who will definitely work with blogs over the course of the next year. Of those currently experimenting with blogs, however, one-third (35%) are very likely and one-quarter (27%) definitely going to work with them within 12 months.

Current use of online media



Future use of online media



**Wikis**

Wikis – online collaborative knowledge stores, are less well-advanced. They have not had the profile of blogs and are a more technical form of social media with often complex rules of engagement. As the table above shows, there has been a lower take-up in the area of wikis, with 60% not having approached the technology at all, compared to just 12% who take wikis seriously. The picture doesn't look like changing much over the next 12 months either, with over 80% of those which have not yet used wikis, unlikely to do so; even those experimenting with wikis are not enthusiastic about embracing the technology in the near future

**RSS**

RSS stands for Really Simple Syndication and is an easy way of subscribing to information updates from selected sources. They are most commonly used by news media, but increasingly other organisations are using RSS to distribute information on a regular, ongoing basis.

This research found one quarter of respondents taking RSS seriously; but there are still 45% whose approach to the matter is non-existent – and two-thirds of those don't plan to change their attitude over the next 12 months. However, those that have experimented with RSS (one-third of respondents) are more optimistic with 48% saying that they will definitely work with RSS during the course of the next year and a further quarter (26%) very likely to do so.

## Working with blogs

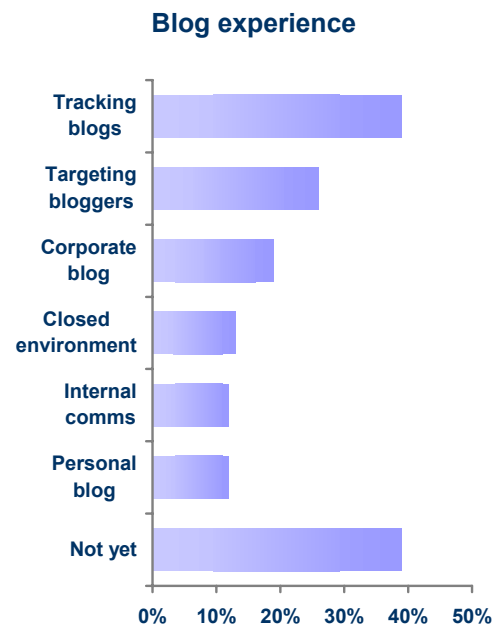
Delving deeper into companies' experience with social media, we asked a series of questions specifically about how they were working with blogs. NB. whilst we believe that the findings below are valid they are based on sometimes small subsets of the overall sample so some caution should be taken with interpretation.

### Experience with blogs

Amongst those working with blogs the most common activity is tracking: nearly two-fifths (39%) of those questioned saying that they are actively tracking blogs important to their company. However, just over a quarter (26%) say they are actively targeting bloggers influential within their company's target market.

Around a fifth of respondents (19%) have a colleague that publishes a corporate blog, while a further 12% publish their own personal blog. Another 13% are experimenting with blogs within a closed environment and 12% are using blogs as a form of internal communications.

Outside of these figures more than one third (39%) of respondents have not yet worked with blogs. (Total is above 100% due to multiple mentions)



**Blog obstacles**

Among those companies that haven't yet worked with blogs, the main reason, cited by 44% of respondents, is that they are unclear of the benefit to their company, while nearly one-third (31%) say they don't know how to use blogs to their, or their company's, advantage.

Just over one in ten (11%) say that working with blogs just hasn't become an issue as yet and the same number have not engaged through fear that blogs can cause harm to their company.

Out in the cold, however, nearly one-fifth (18%) admit that they simply don't know where to start. These companies, which have PR budgets of under £100,000, are also the least likely to use either RSS or wikis and are completely exposed with none of them having any procedures in place to deal with crises arising from social media. And with three-quarters not retaining a PR agency, few have a ready source of expertise to call upon for help.

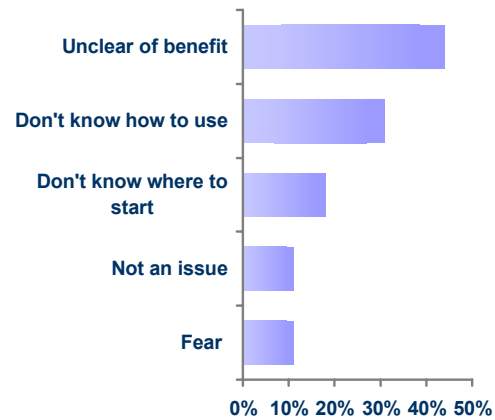
**Blog drivers**

For those that **are** working with blogs, however, we asked what had been the main/original catalyst for getting them to do so.

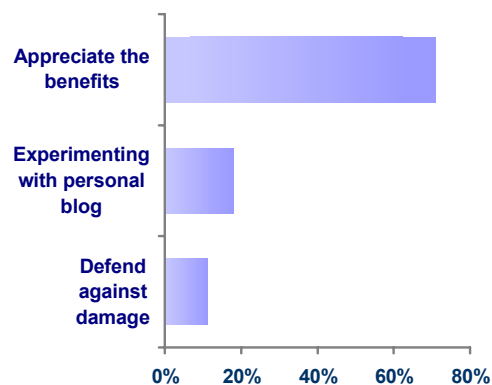
The biggest percentage (71%) said that it was because they appreciate the benefit of proactively engaging with bloggers, nearly one-fifth (18%) wanted to experiment with a personal blog and just over one in ten (11%) said it was to defend their company against damaging blogs.

Other answers included: responding to a directive from senior management, using it as a good thought leader tactic and that it was a natural part of the company's approach to marketing.

**Preventing use of blogs**



**Catalyst for working with blogs**

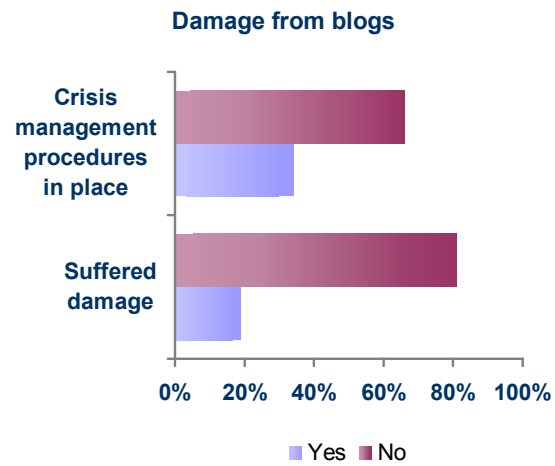


## Damage from blogs

We asked respondents if their companies had suffered damage to their reputation or had been adversely affected by blogs in any way in the last six months. Nearly one-fifth (19%) said they had, a figure which is pretty much consistent whether targeting consumers or businesses as the primary audience.

This is clearly a statistic that should be noted by the 81% that have escaped harm as nearly three quarters (72%) of them have no systems or procedures in place to deal with crises originating from, or exacerbated by, blogs and other online communities. However, it should be noted that, quite remarkably, even among those that had suffered harm, as many as 40% have not yet put procedures in place to deal with future crises.

Further analysis reveals that among those companies that have suffered harm but have yet to develop crisis management strategies, half are not actively tracking bloggers and nearly all have not mapped their online stakeholders, half of them saying this is because they don't perceive the need. All of these companies have a retained agency, but none of them have asked their agency to help develop a social media strategy.



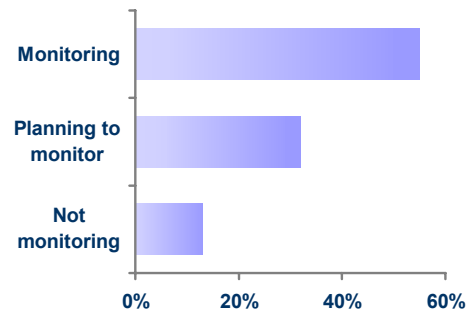
## Monitoring blogs and online communities

As alluded to in the previous section, we asked respondents if they monitor blogs and online communities regularly. More than half (55%) are already monitoring and nearly a third (32%) are planning to do so in the next 12 months, but that still leaves 13% who have no intention of establishing monitoring procedures.

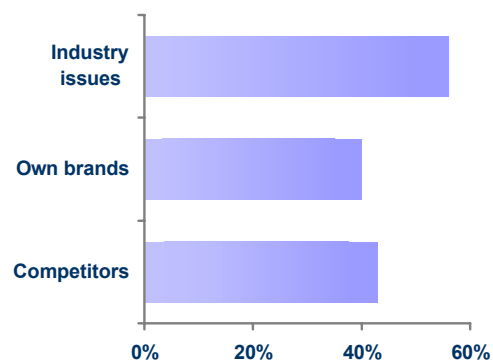
Monitoring appears to be more prevalent among those companies with consumers as their primary audience with nearly three-quarters already doing so and the remainder planning to do so in the next 12 months. Budgets, too, have a bearing with two-thirds of those spending over £100,000 on PR already monitoring blogs, compared to 44% spending less than £100,000. Also above average are those companies who have a retained PR agency: 60% of those are already actively monitoring blogs and 38% planning to.

In terms of what companies are monitoring, more than half (56%) are doing so to keep abreast of industry issues, two-fifths are tracking mentions of their own brands and a fraction more (43%) are keeping an eye on the competition. (Total is above 100% due to multiple mentions)

**Monitoring blogs/  
online communities**



**What's being monitored**

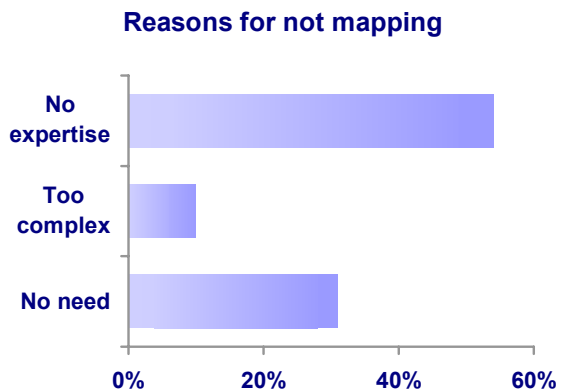
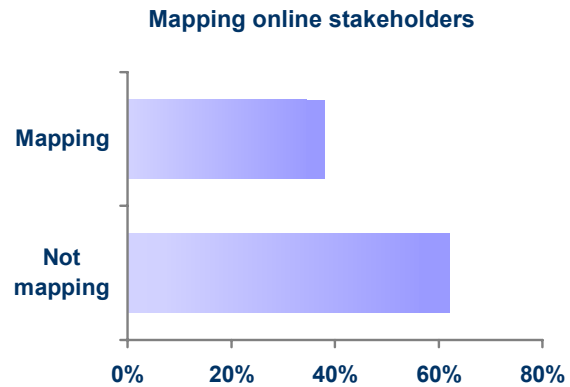


## Mapping online stakeholders

In a similar vein to the previous questions, we asked if respondents were mapping their online stakeholders or had built a clear picture of what their stakeholder communities 'look like'.

Nearly two-fifths (38%) claimed that they were. Of these, three-quarters have used their in-house communications team to develop their social media strategy. The other quarter have done so through their PR agency, despite the fact that 44% have a retained PR agency.

Among those companies that have not mapped their online stakeholders, 54% are not doing so because they lack the expertise, 31% say that they don't have a need and 10% claim the complexity of the task is preventing them.



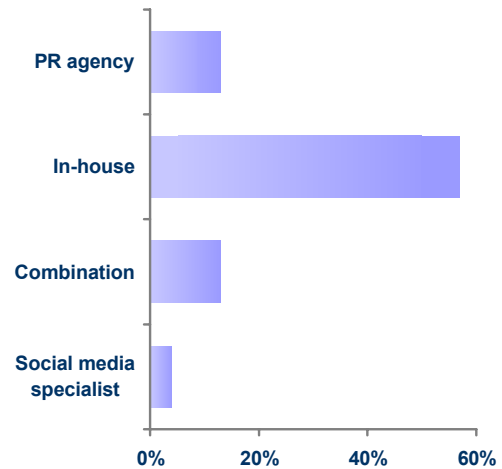
## Who's advising on social media strategy?

With the social media 'revolution' really still in its early stages, there are few (albeit growing) numbers of experts who can help companies develop their social media strategies, so where are companies turning to find the expertise?

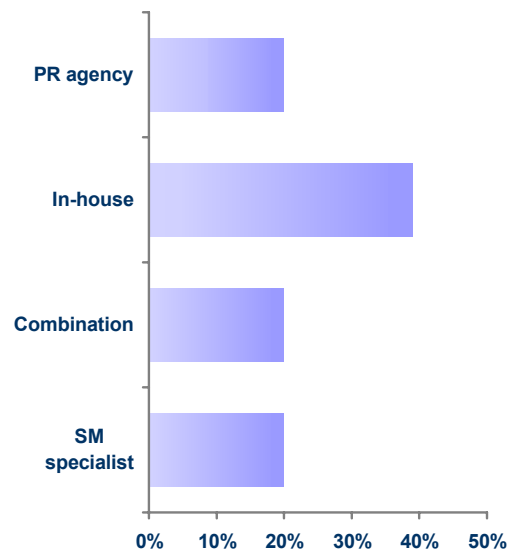
By far, the majority (63%) have developed their social media strategy in-house, while 15% have turned to their agency for assistance and a further 15% have used a combination of in-house personnel and their PR agency. Meanwhile, a handful (4%) have sought the expertise of social media specialists.

Among those companies looking to develop a social media strategy in the future, calling upon in-house resources is still the most favoured option (cited by two-fifths of respondents). However, an increasing number expect to be turning to external help: one-fifth looking to do so in conjunction with their PR agency, another 20% just by their PR agency and the same number again with social media specialists.

Who's advising on social media strategy?



Future development of social media strategy



## Does Social Media have influence?

We asked respondents whether they believed social media has influence on their company or their audiences. More than three-quarters (78%) said that it did, but 13% said that it didn't (with the remainder abstaining from answering the question).

### Among those people that expanded on their answer, comments included:

"Customers want unbiased information. They are more and more suspicious about marketing messages. Social media is about networking, recommendations and collaboration." *marketing manager, software company, Germany*

"Our customers and major stakeholders are sophisticated users and are therefore influenced by what is published." *press manager, IT services company, London*

"Social third party endorsement or criticism has always held more sway over consumers than advertising or media comment and the internet has taken over from the pub, phone and dining table as the first port of call when researching companies or products." *PR manager, telecoms company, UK*

"Some of our audience/users rely on these media for information, referrals and decision making and they will be relying on it even more in the future." *head of marketing, software company, UK*

"I don't see it as a major influence, but aware that some influential analysts/journalists can have an effect through their blogs." *communications manager, software company, UK*

"It's all about trust. If a blogger has credibility and honesty, s/he could be hugely influential." *marketing communications manager, IT solutions, UK*

"I believe it does have influence, but to what degree, or whether that influence is more pervasive than other forms of communicating with our audiences has yet to be seen." *PR manager, IT security company, UK*

"Today, the influence is minor since we address corporate audiences which are not well engaged in these media. However, we are monitoring the area fairly closely in order to respond to threats and opportunities that might arise". *marketing manager, software company, UK*

"If you're not engaging the influential folks that are discussing, influencing, expressing opinions about your brand, both good and bad, you're missing a critical and growing opportunity to help shape perceptions." *corporate communications, IT hardware company, USA*

"People like communities, and online communities offer real power to both the consumer of services and the providers." *sales and marketing director, software company, UK*

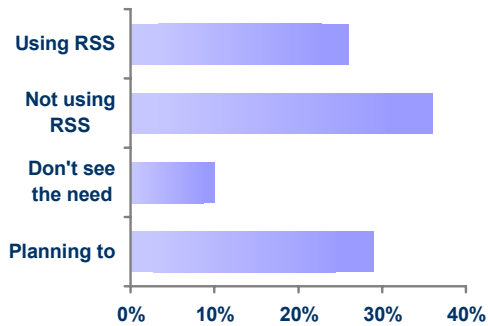
"This is not a significant influence at the moment but has the potential to become one in the not too distant future." *marketing manager, security company, UK*

## Using RSS for media information

Perhaps one of the most surprising finds in the research is the low use of RSS feeds for press releases and other company information. Currently, just 26% are using RSS, although a further 29% are planning to do so within the next 12 months. However, that still leaves 45% with no plans to take the RSS route within the next year.

The companies that are using RSS are among those that appear more advanced in their attitude to social media as a whole. Three-quarters of them are already monitoring blogs and two-thirds have mapped their online stakeholders. On the other side of the coin, among those with no intention of taking the RSS route, 40% also have no intention to monitor blogs and 82% have not mapped their online stakeholders.

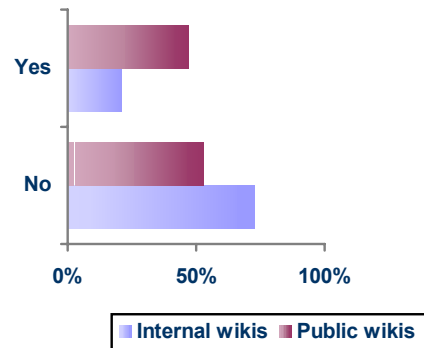
Companies using RSS



## Wikis

Turning to another form of social media, less than one-quarter (21%) of respondents are using wikis for working within their companies. However, a greater number (47%) do use public wikis to keep a check on mentions of their companies and brands.

Working with wikis



## Barriers preventing greater social media activity

Finally, we asked respondents “what is the single biggest barrier preventing you from investing more time and other resources in social media more than you already are?”

Among those respondents which gave a simple answer, lack of adequate resources appears to be the biggest barrier cited by 37%. Clearly resources can apply to a range of issues including personnel, time and money etc., and indeed a further 27% stated time and 18% money as their main hurdles.

The lack of perceived benefit or ability to prove return on investment was mentioned by 12% of companies, while lack of knowledge was the reason given by 18%. An additional 16% said that lack of understanding was their main reason, which could encompass either of the two aforementioned reasons. The lack of need was cited as the main barrier for 6% of companies.



## Barriers preventing greater social media activity – cont...

**Among those that gave more elaborate answers for not undertaking more social media activity, were the following reasons:**

“Discerning good blogs from bad ones. There are too many of them - which have influence? They are more 'underground' so not easy to get a hold of.” *marketing communications manager, mobile company, London*

“Blogging requires a full time dedicated resource and I don't want to detract from the staple PR we are already doing. However, I am aware that it is an issue that needs to be considered.” *PR manager, online company, London*

“Educating internal personnel about the risks and benefits of social media so they understand what they are getting into.” *PR manager, software company, UK*

“We are currently undergoing a change in PR strategy which will see more of a focus on social media and communicating with people online. It will also concentrate on communicating with the online influencers that research has shown operate in our area.” *PR manager, online company, London*

“There is almost zero benefit for us from social media, so why would we?” *PR manager, software company, UK*

“Resistance from the board, concern it's an uncontrollable medium.” *sales and marketing director, software company, UK*

“Full understanding of how it impacts our organisation”. *press officer, consumer technology company, UK*

“Proof that investing will bear results.” *director of marketing, IT hardware company, USA*

“Ignorance of technology and fear of misuse by e-savvy miscreants and loss of control over information.” *corporate communications manager, broadband company, Asia*

“Because social media can spring up from anybody at anytime (and disappear with the same apparent ease), as such it's difficult to keep pace with all areas of relevance”. *marketing manager, security company, UK*

## Conclusions

The beauty of a quantitative survey is that it reveals hard evidence behind opinion, hyperbole and spin. It seems in the case of social media that, although it is not yet the all powerful, all pervasive force suggested by some, it is already well on its way to becoming a mainstream activity, at least within the TMT community.

The last few months have seen a tidal wave of opinion on the impact of social media, and it seems that this has had its own impact with the majority of those we surveyed being aware of social media and at least considering what they should do with it. What has been conspicuously absent is advice on what to do and how to make the right decisions on what to do and when.

This research shows that we've rapidly moved into the early majority phase of a typical adoption curve. The speed of this move is interesting in its own right and suggests that the rest of the cycle may proceed quickly too. This does not mean that writing blogs, targeting online communities and deploying RSS feeds are right for everyone right now, but it does suggest that the majority of organisations should take some steps to analyse the impact of social media on their reputations and sales. Communications professionals need to build the skills and data with which to make informed decisions on if, when and how they want to get into this space.

The first requirement is surely to develop the means and metrics to discover where the points of influence in the online and social media world are, and to make informed decisions on what opportunity/risk they pose to your business.

Secondly, even if you chose not to engage with this audience at the present time, it is worth developing the means and the skills to monitor the 'blogosphere' and ensure that you are up-to-date with issues and opportunities there. This should also involve including social media audiences and outlets as part of formal early-warning crisis plans.

Finally, if you want to take the plunge you will need to know what sort of content works in these areas, and how best to reach, engage with and influence social media.

Harvard is hosting a series of free workshops dealing with the practical issues that lie behind the media buzz over social media. If you'd like to attend please contact Chris Wilson, Business Development Director on 020-8564-6334 or [chris@harvard.co.uk](mailto:chris@harvard.co.uk); alternatively visit our website at [www.harvard.co.uk](http://www.harvard.co.uk).

## Our thanks

We would like to thank all of those who took part in returning questionnaires and making possible this brief survey into current attitudes and opinions towards social media.

Please feel free to reuse elements of the report to support your own research or activities. However, we ask that you reference Harvard PR as the source of this data.

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Harvard Public Relations  
Harvard House  
Summerhouse Lane  
Harmondsworth  
West Drayton  
Middlesex  
UB7 0AW  
Tel: 020-8759-0005  
Fax: 020-8897-3242