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Merger & Management Consultants to the Communications Industry

Confidential Spot Survey #11 *Five Questions on PR/PA Agency Use of Social Media for Clients*

September, 2010

1. Which forms of social media are best for PR/PA purposes in your experience? Click all that apply (1-5, 5 being among the best; leave blanks where you have no opinion). Form Relative Importance (1-5, 5 being among the best)

Averages ALL	1	2	3	4	5	Total Respondent
# Respondees						57
1 Blogs	1	2	9	13	32	57
2 Wikis	5	16	10	4	2	37
3 Podcast	9	11	17	7	5	49
4 Vlogs	9	6	15	10	5	45
5 Video Sites	4	4	13	11	15	47
6 Web Sites	1	1	5	8	41	56
7 Online Games	12	15	7	1	-	35
8 Online Surveys	3	7	15	11	8	44

Less Than \$3 Million	1	2	3	4	5	Total Respondent
# Respondees						38
1 Blogs	1	2	5	12	17	37
2 Wikis	3	9	4	4	1	21
3 Podcast	8	7	8	4	3	30
4 Vlogs	8	2	9	8	-	27
5 Video Sites	3	3	9	8	6	29
6 Web Sites	1	0	4	6	25	36
7 Online Games	5	11	2	1	-	19
8 Online Surveys	1	5	12	3	4	25

More Than \$3 Million	1	2	3	4	5	Total Respondent
# Respondees						20
1 Blogs	-	-	4	1	15	20
2 Wikis	2	7	6	-	1	16
3 Podcast	1	4	9	3	2	19
4 Vlogs	1	4	6	2	5	18
5 Video Sites	1	1	4	3	9	18
6 Web Sites	-	1	1	1	16	19
7 Online Games	7	4	5	-	-	16
8 Online Surveys	2	2	4	8	3	19

Region 1 NY Metro	1	2	3	4	5	Total Respondent
# Respondees						14
1 Blogs	-	-	1	6	6	13
2 Wikis	-	3	2	1	-	6
3 Podcasts	-	-	8	3	-	11
4 vlogs	1	1	4	4	1	11
5 Video Sites	1	1	4	2	2	10
6 Web Sites	-	-	1	3	9	13
7 Online Games	1	4	-	1	-	6
8 Online Surveys	1	2	5	2	-	10

Region 2 DC & Suburbs	1	2	3	4	5	Total Respondent
# Respondees						2
1 Blogs	-	-	-	1	1	2
2 Wikis	-	1	1	0	0	2
3 Podcasts	1	-	1	-	-	2
4 vlogs	-	-	1	-	1	2
5 Video Sites	-	-	1	-	1	2
6 Web Sites	-	-	-	-	1	1
7 Online Games	1	-	1	-	-	2
8 Online Surveys	1	-	-	1	-	2

Region 3 NE	1	2	3	4	5	Total Respondent
# Respondees						1
1 Blogs	-	-	1	-	-	1
2 Wikis	-	-	-	1	-	1
3 Podcasts	-	-	-	-	-	-
4 vlogs	-	-	-	-	-	-
5 Video Sites	-	-	-	-	-	-
6 Web Sites	-	-	-	-	-	-
7 Online Games	-	-	-	-	-	-
8 Online Surveys	-	-	-	-	-	-

Region 4 SE	1	2	3	4	5	Total Respondent
# Respondees						4
1 Blogs	-	-	-	1	3	4
2 Wikis	1	1	-	-	-	2
3 Podcasts	1	1	-	-	-	2
4 vlogs	1	-	1	-	-	2
5 Video Sites	-	-	-	2	-	2
6 Web Sites	0	0	1	1	2	4
7 Online Games	1	-	1	-	-	2
8 Online Surveys	-	1	-	1	2	4

Region 5 Midwest	1	2	3	4	5	Total Respondent
# Respondees						6
1 Blogs	-	-	4	-	2	6
2 Wikis	2	1	1	1	-	5
3 Podcasts	3	1	-	1	1	6
4 vlogs	3	-	-	2	-	5
5 Video Sites	2	2	-	1	1	6
6 Web Sites	-	1	-	-	5	6
7 Online Games	2	2	-	-	-	4
8 Online Surveys	-	1	2	-	2	5

Region 6 SW	1	2	3	4	5	Total Respondent
# Respondees						5
1 Blogs	-	1	-	2	2	5
2 Wikis	-	3	1	-	-	4
3 Podcasts	3	1	-	1	-	5
4 vlogs	1	1	1	-	1	4
5 Video Sites	1	-	1	1	1	4
6 Web Sites	-	-	1	1	3	5
7 Online Games	1	-	2	-	-	3
8 Online Surveys	-	-	2	1	-	3

Region 7 Southern CA	1	2	3	4	5	Total Respondent
# Respondees						8
1 Blogs	-	1	1	2	4	8
2 Wikis	-	2	1	1	1	5
3 Podcasts	-	2	3	-	2	7
4 vlogs	1	-	2	3	-	6
5 Video Sites	-	-	1	3	3	7
6 Web Sites	1	-	1	-	6	8
7 Online Games	1	1	1	-	-	3
8 Online Surveys	-	-	2	2	1	5

Region 8 Northern CA	1	2	3	4	5	Total Respondent
# Respondees						9
1 Blogs	1	-	-	-	8	9
2 Wikis	2	3	2	-	-	7
3 Podcasts	1	4	2	1	-	8
4 vlogs	1	2	3	1	1	8
5 Video Sites	-	-	5	2	2	9
6 Web Sites	-	-	1	2	6	9
7 Online Games	1	6	1	-	-	8
8 Online Surveys	-	2	1	2	2	7

Region 9 NW	1	2	3	4	5	Total Respondent
# Respondees						3
1 Blogs	-	-	1	1	1	3
2 Wikis	-	1	-	-	-	1
3 Podcasts	-	-	1	1	-	2
4 vlogs	1	-	-	-	-	1
5 Video Sites	-	-	-	-	1	1
6 Web Sites	-	-	-	-	3	3
7 Online Games	-	1	1	-	-	2
8 Online Surveys	1	-	1	-	-	2

Region 10 Canada	1	2	3	4	5	Total Respondent
# Respondees						6
1 Blogs	-	-	1	-	5	6
2 Wikis	-	1	2	-	1	4
3 Podcasts	-	2	2	-	2	6
4 vlogs	-	2	3	-	1	6
5 Video Sites	-	1	1	-	4	6
6 Web Sites	-	-	-	-	6	6
7 Online Games	4	1	-	-	-	5
8 Online Surveys	-	1	2	2	1	6

2. What percentage of your total PR/PA practice is devoted to using social media for clients as opposed to more traditional media tools and techniques?

_____ % now	_____ % year ago	_____ % year from now
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	Now	A year ago	A year from now	Total Respondent
<u>Averages ALL</u>				
Total # Respondee	57 30%	55 17%	54 42%	58
<u>Less Than \$3 Million</u>				
Total # Respondee	38 29%	37 17%	37 41%	38
<u>More Than \$3 Million</u>				
Total # Respondee	19 32%	18 17%	17 46%	20

Regions	1 NY Metro	2 DC & Suburbs	3 NE	4 SE	5 Midwest	6 SW	7 Southern CA	8 Northern CA	9 NW	10 Canada
Total # Respondee	14	1	2	4	6	5	8	9	3	6
Now	14 30%	1 15%	2 23%	4 26%	6 22%	5 34%	8 30%	8 41%	3 28%	6 25%
A year ago	14 19%	1 5%	2 15%	4 15%	5 10%	4 23%	8 14%	8 22%	3 14%	6 11%
A year from now	14 38%	1 25%	2 33%	4 39%	5 31%	4 53%	8 43%	8 53%	2 63%	6 34%

3. What percentage of your current use of social media is devoted to the following PR/PA functions? Aim for 100% total if possible; leave entries blank if you have no opinion.

	Media relations	Special events	Product Marketing	Issues Advocacy	Financial Relations	Crisis comms.	Computer gaming	Grassroots Advocacy	Legislative affairs	Political Campaign	Total Respondent
<u>Averages ALL</u>											
Total # Respondee	56 38%	46 16%	41 25%	27 20%	10 10%	29 13%	- -	22 16%	7 8%	4 16%	58
<u>Less Than \$3 Million</u>											
Total # Respondee	37 40%	28 18%	26 21%	15 21%	3 10%	15 13%	- -	15 18%	4 11%	4 16%	38
<u>More Than \$3 Million</u>											
Total # Respondee	19 34%	18 14%	15 31%	12 18%	7 10%	14 12%	- -	7 12%	3 4%	- -	20

Regions	1	2	3	4	5	6	7	8	9	10
	NY Metro	DC & Suburbs	NE	SE	Midwest	SW	Southern CA	Northern CA	NW	Canada
Total # Respondee	14	2	1	4	6	5	8	9	3	6
Media Relations	13 52%	2 25%	1 15%	4 40%	6 24%	5 27%	7 39%	9 45%	3 22%	6 34%
Special Events	9 16%	2 15%	- -	4 16%	5 9%	4 25%	7 29%	7 9%	3 13%	5 13%
Product Marketing	8 30%	1 45%	1 10%	3 13%	6 27%	2 43%	6 18%	7 18%	3 38%	4 20%
Issues Advocacy	5 21%	1 40%	1 25%	1 15%	3 13%	1 10%	4 23%	6 20%	- -	5 19%
Financial Relations	1 10%	1 10%	- -	- -	3 12%	1 10%	1 5%	2 13%	- -	1 5%
Crisis Comms.	5 9%	5 10%	- -	2 23%	4 15%	2 30%	3 13%	7 9%	1 20%	3 7%
Computer Gaming	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Grassroots Advocacy	1 10%	1 5%	1 15%	2 10%	4 13%	1 40%	3 25%	4 20%	2 13%	3 12%
Legislative affairs	- -	1 5%	1 20%	1 5%	2 7%	- -	- -	1 5%	1 10%	- -
Political Campaigns	- -	- -	1 15%	- -	2 23%	- -	- -	- -	1 5%	- -

4. What is the estimated percentage of time you devote in a typical month to the use of these social media for clients? Aim for 100% total if possible; leave entries blank if you don't use a particular medium.

	Youtube	Facebook	Twitter	LinkedIn	MySpace	Plaxo	Slide Game	Fisxster	Tumblr	Vimeo	epinions	Four Square	Digg	Technorati	Total Respondent
<u>Averages ALL</u>															
Total # Respondee	50	54	54	30	5	2	-	-	3	4	2	15	11	13	58
	14%	31%	29%	18%	17%	10%	-	-	7%	5%	10%	7%	6%	8%	
<u>Less Than \$3 Million</u>															
Total # Respondee	31	35	35	20	3	1	-	-	1	1	2	7	3	5	38
	15%	34%	30%	21%	25%	5%	-	-	10%	5%	10%	6%	20%	9%	
<u>More Than \$3 Million</u>															
Total # Respondee	19	19	19	10	2	1	-	-	2	3	-	8	8	7	20
	13%	26%	28%	10%	4%	15%	-	-	6%	5%	-	8%	6%	7%	

Regions	1	2	3	4	5	6	7	8	9	10
	NY Metro	DC & Suburbs	NE	SE	Midwest	SW	Southern CA	Northern CA	NW	Canada
Total # Respondee	14	2	1	4	6	5	8	8	9	6
Media Relations	13 52%	2 50%	1 15%	4 40%	6 24%	5 27%	7 39%	9 45%	3 22%	6 34%
Special Events	9 16%	2 15%	- -	4 16%	5 9%	4 25%	7 29%	7 9%	3 13%	5 13%
Product Marketing	8 30%	1 45%	1 10%	3 13%	6 27%	2 43%	6 18%	7 18%	3 38%	4 20%
Issues Advocacy	5 21%	1 40%	1 25%	1 15%	3 13%	1 10%	4 23%	6 20%	- -	5 19%
Financial Relations	1 10%	1 10%	- -	- -	3 12%	1 10%	1 5%	2 13%	- -	1 5%
Crisis Comms.	5 9%	5 10%	- -	2 23%	4 15%	2 30%	3 13%	7 9%	1 20%	3 7%
Computer Gaming	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Grassroots Advocacy	1 10%	1 5%	1 15%	2 10%	4 13%	1 40%	3 25%	4 20%	2 13%	3 12%
Legislative affairs	- -	1 5%	1 20%	1 5%	2 7%	- -	- -	1 5%	1 10%	- -
Political Campaigns	- -	- -	1 15%	- -	2 23%	- -	- -	- -	1 5%	- -

5. What challenges do you see for PR/PA agencies in the increased use of social media for PR /PA purposes?

- | |
|--|
| 1. Maintaining credibility _____ |
| 2. Trivializing PR/PA programs _____ |
| 3. Tracking/measuring results and quantifying value. _____ |

	Maintaining Credibility	Trivializing PR/PA Programs	Tracking/Measuring Results & Quantifying Value	Total Respondent
<u>Averages ALL</u>				
Total # Respondee	30 58%	12 21%	44 76%	58
<u>Less Than \$3 Million</u>				
Total # Respondee	9 45%	3 15%	15 76%	38
<u>More Than \$3 Million</u>				
Total # Respondee	21 55%	9 24%	29 76%	20

Regions	1	2	3	4	5	6	7	8	9	10
	NY Metro	DC & Suburbs	NE	SE	Midwest	SW	Southern CA	Northern CA	NW	Canada
Total # Respondee	14	2	1	4	6	5	8	8	9	6
Maintaining Credibility	8 57%	1 50%	1 100%	1 25%	1 17%	3 60%	4 50%	5 56%	3 100%	3 50%
Trivializing PR/PA Programs	4 29%	-	-	-	-	2 40%	1 13%	4 44%	-	1 17%
Tracking/Measuring results & quantifying value	10 71%	2 100%	1 100%	2 50%	4 67%	3 60%	7 88%	6 67%	3 100%	6 100%

This survey is the first on Social Media by **StevensGouldPincus**, which has been conducting industry wide surveys for 22 years. These have included PR consulting agency performance benchmarks covering revenue growth, expense controls, profitability, and best practices. We plan further surveys of Social Media use. SGP is based in New York. Its three top principals built and sold highly successful businesses in communications consulting and accounting. For questions about this survey, contact Art Stevens (astevens@stevensgouldpincus.com) or Don Bates (dbates@stevensgouldpincus.com).