

# Tennessee Communicators' Social Media Attitudes and Utilization: A 2010 Snapshot

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## Overview

When our Tennessee-based companies – **Blue Media Boutique, LLC** and **Mary Beth West Consulting, LLC** – started developing the Interactive Springboard joint venture in 2009, we knew that exciting times lay ahead for our collaboration as well as for our respective professions in the marketing communications arena.

The explosion of online communications technologies has placed every business owner and organizational manager in the driver's seat with direct power to initiate and manage communications with their audiences as never before.

Like every sea change of this magnitude, however, the compelling upside has been accompanied by a discernible downside. Yes – companies from global to micro in scope possess sophisticated and powerful tools that enable them to inform, persuade and motivate their diverse stakeholder groups. But at the same time, the very accessibility of the tools themselves and those tools' highly public messages and outcomes also lend themselves to challenges associated with proper planning, execution and measurement of ROI.

We founded Interactive Springboard to take the best of what each of our firms has to offer – online / interactive development and public relations, respectively – and package this expertise together to help clients develop online communications anchored in research, online strategy, reputation management and measurement.

In the same way that we advise our clients, one of our first efforts as a formal joint venture focused on conducting research of our own statewide marketplace in Tennessee. We are delighted to share this report, "**Tennessee Communicators' Social Media Attitudes and Utilization: A 2010 Snapshot**," which provides insights on where many professional communicators working in the state of Tennessee think social media stands and has potential to be applied within their companies and organizations.

We owe tremendous gratitude to our collaborator and lead researcher for this study, Rebecca Bryant of **Bryant Research, LLC**, who along with her colleague Erin Byers painstakingly managed the development of a meaningful survey instrument, the outreach to Public Relations Society of America chapter members across the state and the analysis of the data.

We also thank the **Public Relations Society of America** (PRSA) headquarters office in New York, including President and COO William Murray and Christina M. Darnowski, director of research and project management, for their support, as well as PRSA chapters and members throughout Tennessee who participated in the survey. We appreciate our own respective staff teams for their support in making this study possible.

We look forward to the prospect of generating additional data in the future that will shed light on social media use trends among Tennessee businesses and organizations. To that end, we welcome comments, questions and dialogue – so please join in the conversation at [www.facebook.com/interactivespringboard](http://www.facebook.com/interactivespringboard).

**Tori Rose, President and Founder**  
Blue Media Boutique, LLC  
[www.bluemediaboutique.com](http://www.bluemediaboutique.com)  
[www.facebook.com/bluemediaboutique](http://www.facebook.com/bluemediaboutique)

**Mary Beth West, Principal**  
Mary Beth West Consulting, LLC  
[www.marybethwest.com](http://www.marybethwest.com)  
[www.facebook.com/marybethwestconsulting](http://www.facebook.com/marybethwestconsulting)

## Preface

In ramp-up to this survey project, our team conducted an assessment of existing open-source research covering social media use among businesses and organizations at the national level.

Much of this research has covered and continues to cover which social media tools are being used most by companies and organizations (i.e. Facebook, Twitter, LinkedIn, blogs, etc.) to directly promote themselves for sales and other revenue-generation purposes. Other studies provide a wide variety of other insights tied to how social media is being applied to achieve specific outcomes (not necessarily revenue-focused), or, on the flipside, how social media must be managed to avoid negative impacts. Our team continues to monitor research reports from other sources to help lend context and insights for client organizations in Tennessee.

Some of the most recent national data released in 2010 include the following research, which demonstrates the extent to which social media is being adopted by diverse organizations, for diverse purposes:

- In a CareerBuilder.com study conducted in spring 2010, 29 percent of organizations with 500 or fewer employees say they are utilizing social media to market their companies; 38 percent of organizations with 501-1,000 employees are doing so; and 44 percent of organizations with more than 1,000 employees are doing so.
- The Jobvite Social Recruiting 2010 online survey reported that 92 percent of their survey respondents that are actively hiring this year either “currently use or plan to use” social networks in order to seek out new employees.
- Security firm Webroot released a survey of 803 IT professionals from both small and mid-size organizations, reporting that 80 percent of them predict social media tools like Facebook will cause a problem for their companies this year. In its story on the Webroot study, *Inc.* magazine also reported that about 75 percent of small business owners “fear use of Facebook and Twitter will come back to haunt them.”
- An IBM study released in late August 2010 reports that “45 percent of IBM Business Partners are experimenting with a social media business strategy to generate new revenue streams; however, three-quarters say they are still uncertain how to apply it as an effective sales tool.”
- SocialMediaExaminer.com released a study in April 2010 reporting that nationwide, a significant number of marketers (65 percent) “have only been involved with social media marketing for a few months or less,” and that on the issue of time demands, “the majority of marketers (56 percent) are using social media for six hours or more each week, and nearly one in three invest 11 or more hours weekly.”

With the scope of these and many other fairly recent studies in mind, our team wanted to understand a broad picture of outcomes that Tennessee communicators anticipate can be provided from social media – and, juxtaposed with those expectations, how their own organizations are performing now to meet that potential.

To that end, the study did not delve into the specifics of certain social media tools, rates of use, etc. Instead, a significant portion of the study asked respondents to rate the importance of applying social media to specific outcomes – and then followed up with questions on how well their own organizations were performing in using social media to those ends.

## Key Themes

Among some of the key themes that highlighted the results, professional communicators surveyed in Tennessee largely believe that social media:

- Is here to stay and is not a passing fad
- Is an important part of any communications plan
- Is changing how the vast majority of organizations communicate with their customers and employees
- Is an integral part of crisis communications planning

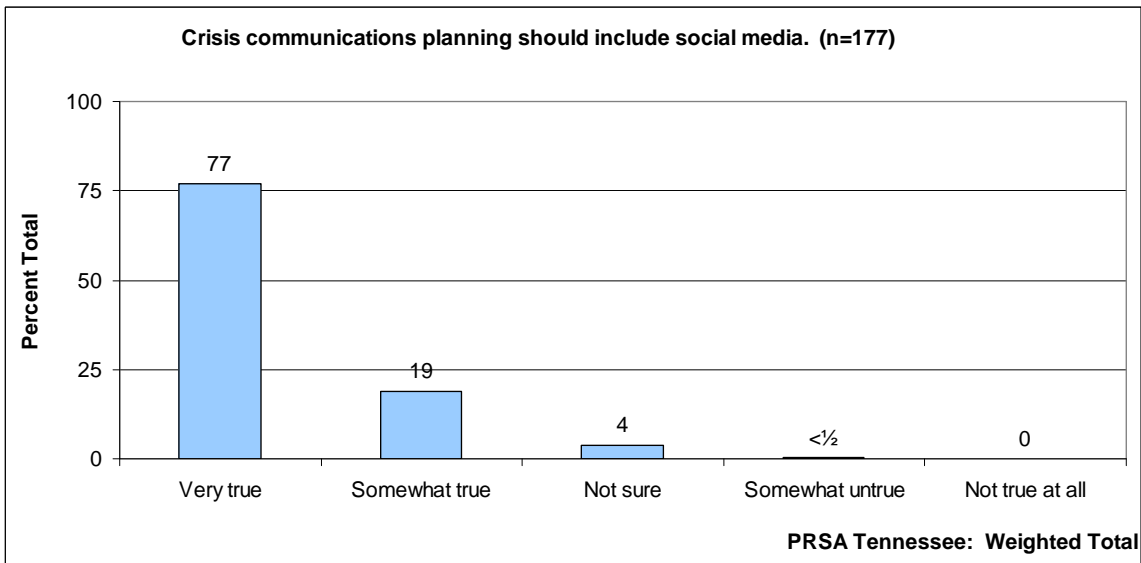
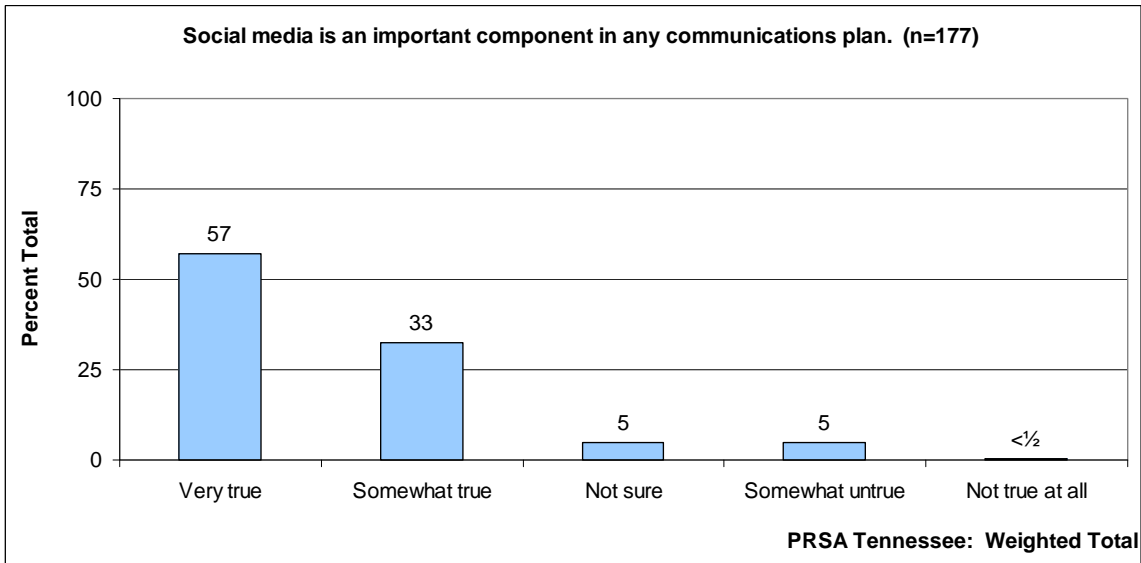
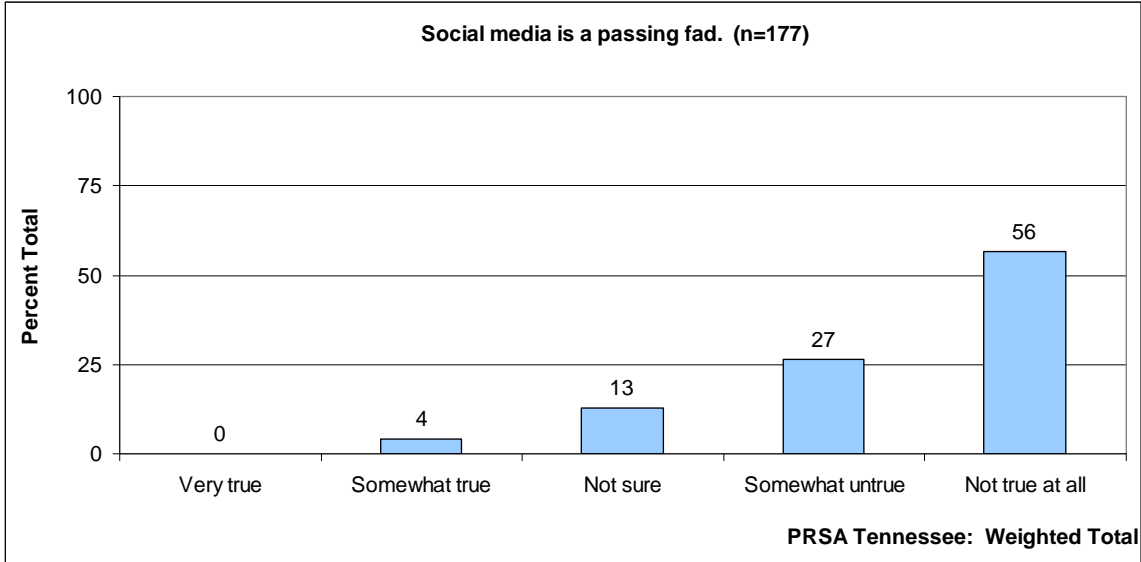
In addition, uncertainty defines several key aspects of social media management for Tennessee communicators, including:

- What combination of social media and traditional media to use
- How social media can contribute to an organization's bottom line and how to measure it
- Whether federal regulations have negatively impacted adoption of social media

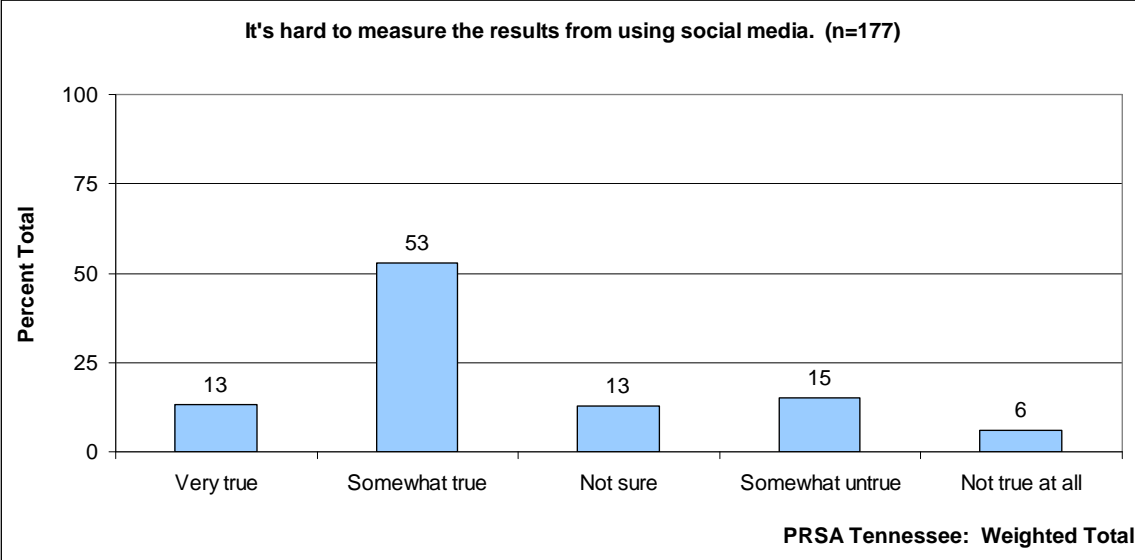
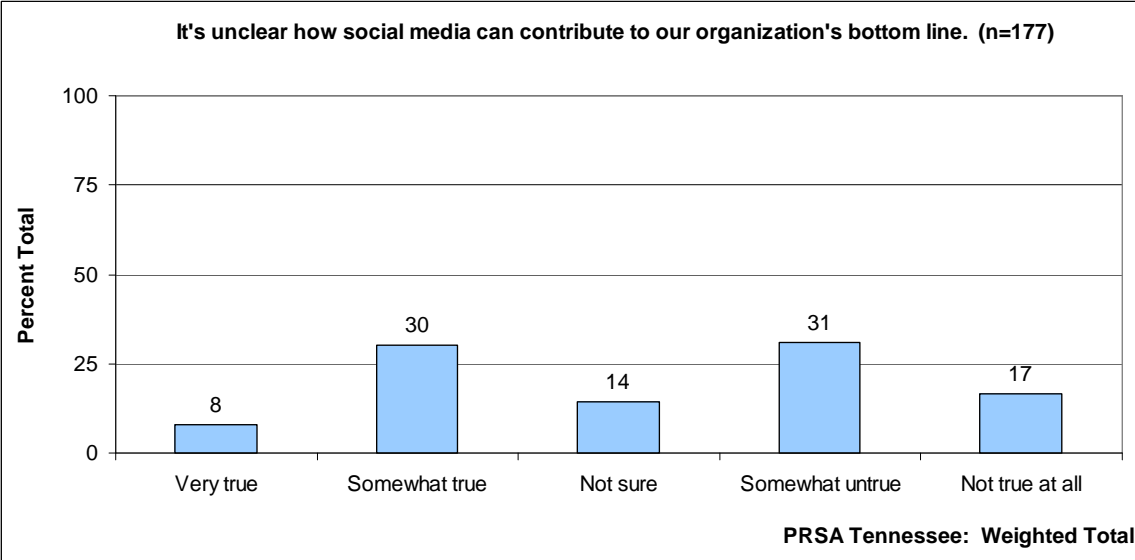
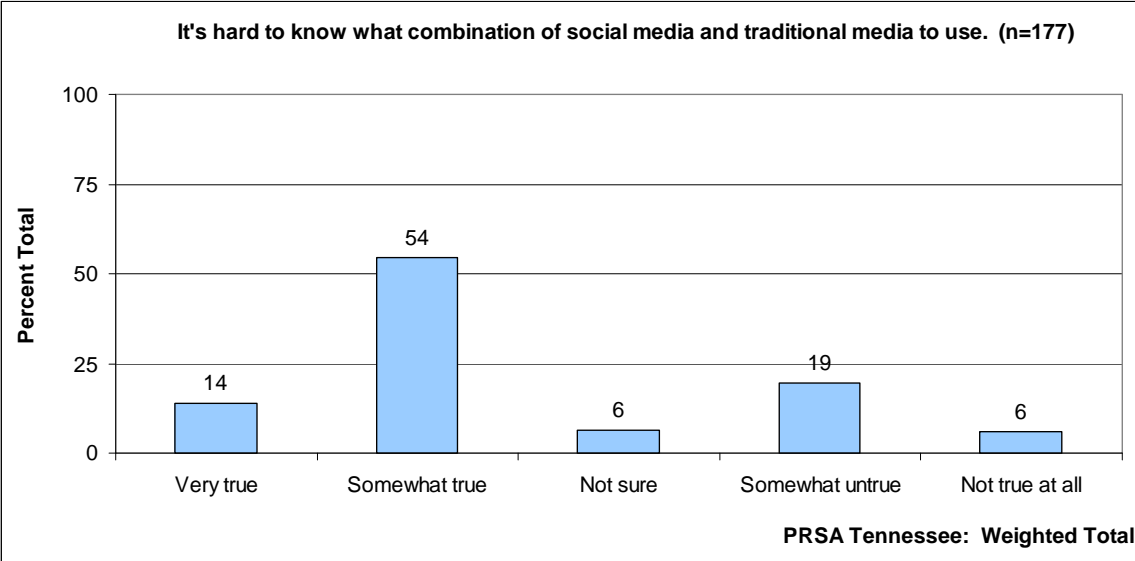
Tennessee communicators also think their organizations are falling short in using social media relative to the importance of using it to achieve the following outcomes:

- Crisis communications
- Employee training initiatives
- Testing new product ideas
- Building a strong internal culture
- New product development
- Monitoring comments about one's own organization
- Dedicating an employee to managing social media

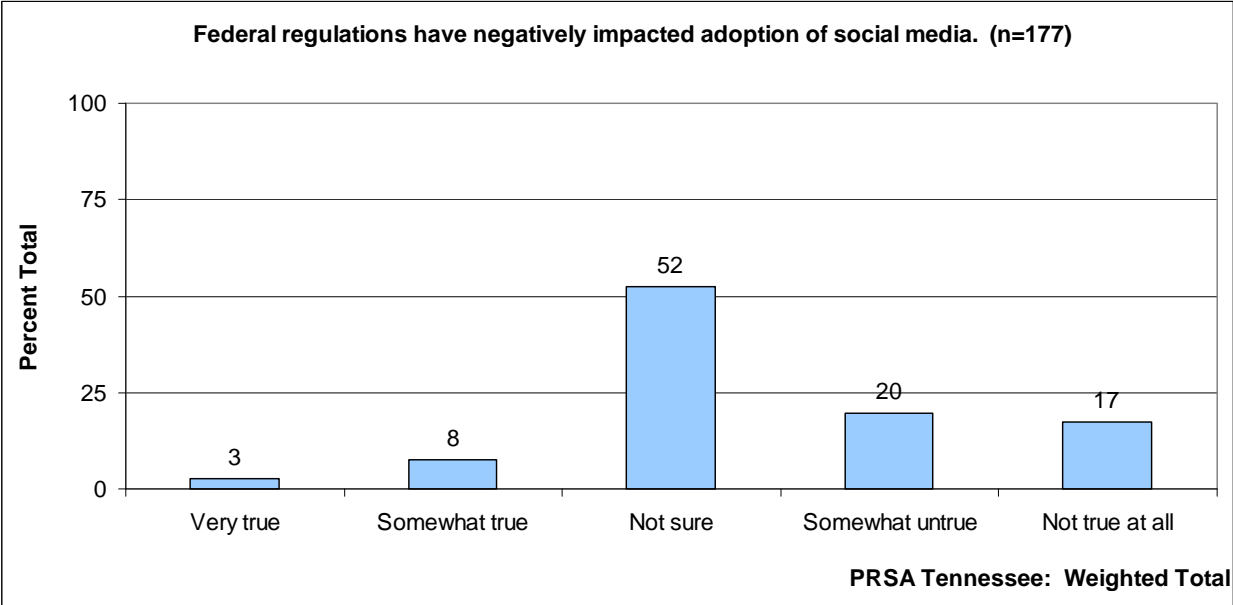
Social media is here to stay and is an important part of communications plans.



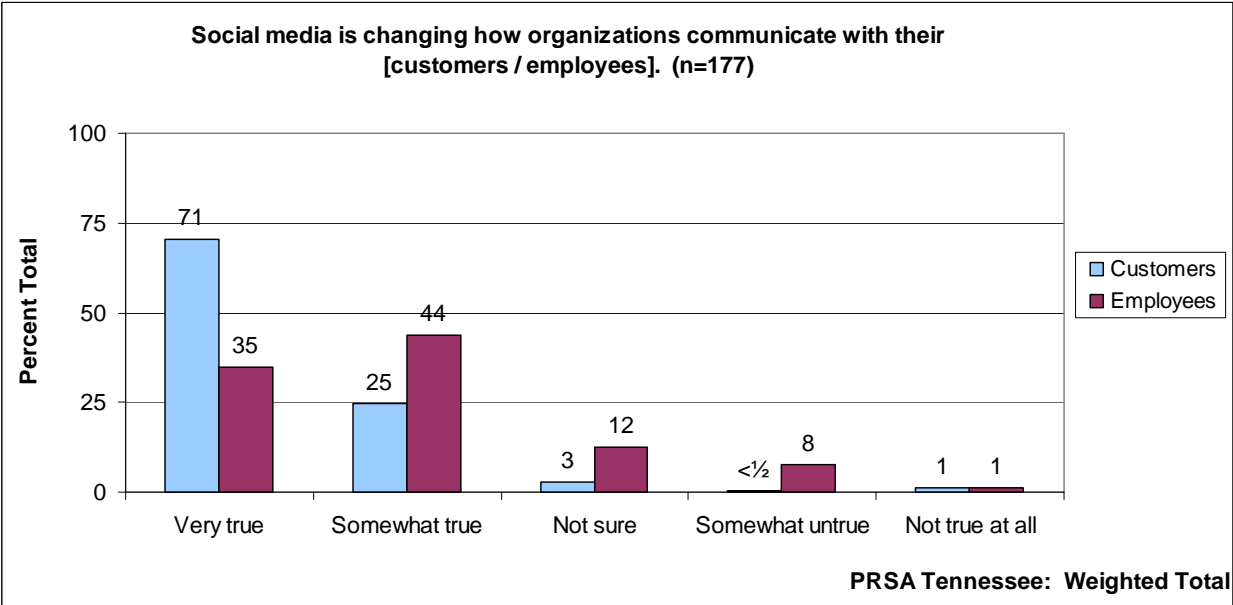
Uncertainty surrounds several key aspects of social media management.



Uncertainty also surrounds whether federal regulations have negatively impacted adoption of social media.



While survey respondents think social media is changing how organizations communicate with their customers more so than employees, the degree of agreement about employee communications impact is still significant.



## Gap Analysis

The survey's Gap Analysis was conducted with the following process:

- Survey respondents were asked to rate the importance of selected aspects of managing social media by using a 7-point scale, where 1 meant "very unimportant" and 7 meant "very important." This score is referred to as the importance rating.
- Second, they were asked to rate their own company's / organization's performance on each dimension using a 7-point scale, where 1 meant their company does not manage this aspect well and 7 meant their company manages the aspect very well. This value is referred to as the performance rating.
- The difference between the level of importance placed on each dimension and actual performance is referred to as the Gap Score. **Mean performance rating – Mean importance rating = Gap Score**
- Gap Analysis offers the ability to both pinpoint and prioritize information for action. For example, if two items have similar negative Gap Scores, management should focus first on the item with a higher importance rating.

This study's Gap Analysis shows PRSA professionals place the highest level of importance on:

1. monitoring Social Media for comments about their organizations
2. using Social Media for crisis communications

PRSA Tennessee Mean Ratings	How Important Is . . . ?		Gap Score (rounded)	How well my organization is . . .	
	Not sure / Percent Total	(1=Not at all important, 7=Very important) (rounded)		(1=Not well at all, 7=Very well) (rounded)	Do not use / Percent Total
Listed by respondent rankings of importance, from most to least:					
monitoring Social Media for comments about your organization	2.0	6.4	-1.5	4.9	5.7
using Social Media for crisis communications	2.2	6.2	-2.2	4.1	16.7
including Social Media in new product development	5.0	5.8	-1.9	3.8	32.8
dedicating an employee to managing Social Media	3.3	5.7	-1.3	4.4	13.4
using Social Media to test new product ideas	9.7	5.6	-2.0	3.5	35.0
using Social Media as a tool for building a strong internal culture	7.0	5.1	-1.9	3.3	19.8
incorporating Social Media into employee training initiatives	11.5	4.7	-2.2	2.4	35.7

Primary research and data analysis provided by Bryant Research – [www.bryant-research.com](http://www.bryant-research.com)

In most cases, the Gap Score is -1.5 or even more negative. This degree of separation between importance rating and performance rating indicates that many PRSA professionals across the state think their companies / organizations have room to improve how they use social media in a variety of diverse applications.

**NOTE:** Roughly two-thirds of those surveyed reported their companies are using social media in new product development or in employee training, but they are falling short of achieving their desired level of success. Also of note is that one in 10 respondents reported they are uncertain about using social media in new product development and employee training.

## Conclusions and Recommendations

In light of these results, and with the anecdotal knowledge our collective team has gained in working with clients to meet many of the challenges voiced by this study's survey respondents, we offer the following observations:

- **Tennessee companies and organizations that haven't begun at least an initial integration of social media into their communications programs should consider that ongoing delays may result in a competitive disadvantage.** With widespread agreement among Tennessee communications professionals that social media is now part of the permanent fabric of organizational communications, every organization should consider social media's advantages to inform, persuade and motivate key audiences toward actions that support critical objectives.

In these most recent formative years of social media's availability in the marketplace, early adopters have now helped establish a set of best practices (and noted missteps to avoid) from which other organizations can learn and benefit. We predict that organizations that continue to opt out of social media use wholesale will, in the coming months and years, find themselves further isolated from opportunities to build relationships with customers, other sales prospects / points of referral, community members, employees / employee prospects, donors / investors and other critical stakeholder groups – all the while competitors may have established programs in place, generating business results.

- **Companies and organizations in Tennessee should avoid launching any social media effort without first conducting as much research and information-gathering as available resources allow.** Given that this survey data points to high uncertainty about measuring return on investment and how social media contributes to the bottom line, we firmly believe that much of this lack of clarity stems from poor or non-existent performance metrics being created on the front end of a social media effort – which are of critical importance toward establishing program performance baselines.

Also tied to the critical need for pre-campaign research, our observations of the larger marketplace have shown that social media efforts can derail quickly due to lack of an accurate understanding about the audiences an organization wishes to reach and engage using social media and online communications.

Research can provide a definitive gauge of what those audiences' needs and expectations are, tied to informational and interactional opportunities that an organization's social media must deliver to be successful. In short, appropriate research will not only inform the measures for success, but it will also provide the roadmap for reaching successful outcomes as well as benchmarks against which campaign effectiveness can be measured.

As a footnote, it cannot be overstated that the landscape of available social media tools, applications, capabilities and functionality represents a massive moving target. Consumer awareness and utilization of these tools are constantly changing, and companies / organizations must remain abreast of these changes and their impact on current marketing communications strategies and tactics involving online and mobile communications. This reality represents yet another rationale for market research conducted on a regular basis that provides adequate monitoring of trends and helps companies and other organizations make the best business decisions.

- **Tennessee communications professionals in this study largely recognize that a return on investment can be achieved through social media.** Anecdotally (not part of these specific survey results), companies that are most successful take a serious approach toward message development, content creation / management and responsive feedback to audience queries and posts. We encounter many companies and organizations seeking out advice with a common challenge to "feed the beast" of social media communications channels, after they've already created and launched those channels on their own but now don't know how to manage and update them, respond to third-party posts and inquiries, and "keep fresh" the content on an acceptable time basis.

The area of content management is where a large portion of social media resources are required continuously – and yet many organizations do not recognize the need to provide resources adequately until their social media tools have already been publicly launched. Such resources generally require paid staff time or outsourced staff time, or a combination of both, with well-defined roles and responsibilities.

We urge companies and organizations to avoid the cart-before-the-horse approach, and prior to launching any social media tools or online presence, to allocate resources appropriately to service and maintain those communications channels, such that these tools produce the desired results of building relationships, prompting positive audience interactions and maintaining an affirmative visibility for the brand.

- **Tennessee companies and organizations in crisis-prone / high-risk fields should integrate social media tools and communications strategies into their emergency communications and business continuity plans.** Using social media for crisis communications was a top-priority item according to the survey, yet it garnered the most negative Gap Score – meaning that Tennessee communications professionals see significant deficiencies in social media integration into crisis communications in their own organizations. This survey's strong, quantified agreement from the professional community statewide about social media's high importance in crisis planning can help build the case with C-Suite executives to invest necessary resources for developing social media for crisis planning, management and recovery. There also exists an expanding base of case studies nationwide demonstrating the application and effectiveness of social media in crisis response.
- **Tennessee's business professionals who manage employee communications, relationship-building and team development should embrace social media for direct support of organizational performance.** While this survey documented that Tennessee communications professionals think social media is impacting customer communications more so than employee communication, the prospect of using social media effectively as an employee communications tool represents a significant competitive opportunity for companies that wish to retain high-quality workforce members as the economy slowly gains in improvement. In addition, the study produced significant Gap Scores for Tennessee organizations in the areas of using social media to build a strong internal culture and supporting employee training initiatives – pointing to significant opportunities for improvement as well.

As an aside, national research documents many positive financial outcomes of strong employee relationship-building in the workplace, and social media can play a vital role in that process. For example, an April 2009 Towers Perrin study of 40 global companies concluded that “companies with highly engaged employees generate more marketplace power than competitors,” including measurable gains in operating margins and net profit margins as well as shareholder returns.

- **Companies and organizations in Tennessee interested in developing new products/services and/or refining existing ones should consider social media as a tool.**

While new product development may fall outside the scope of day-to-day responsibility for some of this survey's respondents, many communications professionals from across the state noted this area as one of opportunity for their organizations. Incorporating social media into the new product development process can be as simple as monitoring social media for comments about the organization or as elaborate as presenting new products or services online. As an example, at the 2010 worldwide Association for Qualitative Research (AQR) / Qualitative Research Consultants Association (QRCA) conference in Prague, a researcher successfully tested store design for a new organic produce venture by placing two different stores in Second Life, tracking store "traffic," and probing "shoppers" for preferences and rationales.

- **Tennessee companies and organizations operating in sectors with a high level of government regulation / compliance issues relative to customer and public communications (i.e. healthcare, financial services, government agencies, etc.) should address any issues of uncertainty tied to perceived social media regulations.** Based on our team's experience, where high levels of uncertainty exist, managers can be prone to exclude social media automatically from the thought process about communications plans – and that exclusion can result in a significant opportunity lost to realize social media's benefits. While some sectors do indeed face significant parameters or restrictions tied to social media use, we are finding that over time, many of these restrictions are being eased as governing agencies become more knowledgeable about available tools, uses and benefits, and how – with appropriate standards of practice and controls – these tools can be integrated at least conservatively into communications programs. It is also worth noting that social media-type functionality can exist with proprietary social networking platforms that can be built and completely controlled by the sponsoring company or organization, such that a company doesn't have to use public platforms such as Facebook in order to reap the benefits from adopting these kinds of tools.

## Research Objective

The objective of this survey research was to quantify attitudes and perceptions regarding social media among professional communicators in Tennessee.

Several formal membership groups exist that serve as networking and professional development organizations in the field of communications, such as the American Marketing Association, American Advertising Federation, International Association of Business Communicators and the Public Relations Society of America. Among all of these organizations – each of which includes various chapters within the state of Tennessee – the Public Relations Society of America (PRSA) was selected as the partner organization for this first study, based on the job functions of its members encompassing a wide range of communications management functions for diverse companies and organizations on the “client” side, as well as its statewide chapter-based presence in all three divisions of the state and inclusive of Tennessee’s largest regional population centers.

## Methodology

Online research was conducted by Bryant Research from June 16 - August 6, 2010, using a census survey of Public Relations Society of America (PRSA) members from the state of Tennessee’s five chapters: Chattanooga “Lookout” Chapter, Knoxville “Volunteer” Chapter, Memphis Chapter, Nashville Chapter and Tri-Cities Chapter. In addition to the core questions highlighted in this report, each chapter had the option of appending proprietary questions of specific interest to the local membership. The survey achieved an overall response rate of 24 percent and provides unique insight into the opinions of those whose day-to-day responsibilities include managing all manner of media – including social media. For both the Nashville and Volunteer chapters, the survey sample included dues-paying PRSA members as well as member prospects. Survey distribution was also inclusive of all other Tennessee-based PRSA members affiliated with the other three chapters in the state.

## Results

Response rates were as follows (unweighted counts):

Region	Completed Surveys	Sample Size	Response Rate
Nashville	44	145	30 %
Knoxville	61	347	18 %
Chattanooga	18	55	33 %
Memphis	30	106	28 %
Tri-Cities	6	19	32 %
<b>TOTALS</b>	<b>159</b>	<b>672</b>	<b>24 %</b>

Data was weighted for analysis to reflect the concentration of sample from each chapter. Survey respondents included a strong mix of business sectors, with health care and education entities responding with greatest frequency. Other types of responding organizations included marketing, non-profit, government, financial, tourism, manufacturing, utilities and others. More than half of respondents reported they work with companies of 101 or more employees and with 2009 revenues of more than \$10 million. Among the age cohorts of respondents, 26 percent reported their age as 25-34; 31 percent reported their age as 35-44; and 23 percent reported their age as 46-54. Management levels reported were “senior management” at 30 percent of respondents; “middle management” at 51 percent; “specialist” at six percent; and “other” at 14 percent.

## About Interactive Springboard

Interactive Springboard ([www.interactivespringboard.com](http://www.interactivespringboard.com)) is a joint venture between two separate but equally focused women-owned companies – Blue Media Boutique, LLC and Mary Beth West Consulting, LLC – providing clients with an integrated, measurement-based approach to online communications and social media supporting marketing and business objectives.



The team combines depth of expertise in two specific service categories to execute effective online and social media strategies through 1) Web, interactive and social media development and 2) communications, relationship and reputation management.

Both firms are located in the Greater Knoxville, Tenn., area but work with clients throughout the state and the nation.

The collective Interactive Springboard team helps clients:

- Understand their unique audiences and how social and online media can inform, persuade and motivate them to action
- Keep sight of brand reputational equity, identity and long-term goals
- Choose the right social and online media tools and tactics, balancing both business objectives and resources
- Make long-term communications plans work financially and deliver ROI

### Principal Authors of this Report:



As head of Knoxville-based Blue Media Boutique, LLC, **Tori Rose** has 16 years of experience producing award-winning creative and interactive work. Prior to starting her own firm, she served as vice president, creative director of RIVR Media Interactive (RMI), where she managed creative work for a wide variety of clients' online assets, including PricewaterhouseCoopers, Shell and Duke University. Previously, she served as creative director of Edison Schools in New York, Chris Whittle's entrepreneurial education initiative. She holds a master's degree in media from The New School University and a bachelor's degree from Wake Forest University.



**Mary Beth West, APR**, has produced a range of award-winning communications work in her career. Her public relations firm – Mary Beth West Consulting, LLC – includes a seasoned team with prior in-house experience at such companies as General Motors, Boeing, Lockheed Martin, Blue Cross/Blue Shield Association, Eastman Kodak, Corrections Corporation of America and the former Union Planters Bank. West has served two engagements with the national board of the Public Relations Society of America (PRSA), and she currently serves on the University of Tennessee College of Communication and Information Board of Visitors.



**Rebecca Bryant** leverages more than 15 years' research experience supporting employee relations, brand positioning and customer value determination. With expertise including a custom blend of quantitative and qualitative research methods, Rebecca's previous client projects include Rohm and Haas, the Department of Defense, University of Tennessee, Knox County Government, Pepsi Cola, ORNL Federal Credit Union, Hasbro, Baptist Health System, Frito Lay, Rubbermaid and HGTV. Rebecca holds a bachelor's in psychology and an MBA from the University of Tennessee, where she holds lecturer status in the College of Business.

Contact:



mary beth west  
consulting LLC

*Advancing Communications, Relationships and Reputations*

Mary Beth West, APR  
Mary Beth West Consulting, LLC  
324 S. Washington Street  
Maryville, TN 37804  
T: 865 / 982-6626  
F: 615 / 523-3333 (*private e-fax*)  
[mb@marybethwest.com](mailto:mb@marybethwest.com)  
[www.marybethwest.com](http://www.marybethwest.com)  
[www.facebook.com/marybethwestconsulting](http://www.facebook.com/marybethwestconsulting)

bluemedi  
BOUTIQUE

Tori Rose  
Blue Media Boutique  
119 S. Gay Street  
Knoxville, TN 37902  
T: 865 / 523-9911  
[tori@bluemediaboutique.com](mailto:tori@bluemediaboutique.com)  
[www.bluemediaboutique.com](http://www.bluemediaboutique.com)  
[www.facebook.com/bluemediaboutique](http://www.facebook.com/bluemediaboutique)



**Bryant Research**  
Exploration / Focus / Discovery

Rebecca Bryant  
Bryant Research  
P.O. Box 23274  
Knoxville, TN 37933  
T: 865 / 207-3276  
F: 865 / 675-0214  
[rebecca@bryant-research.com](mailto:rebecca@bryant-research.com)  
[www.bryant-research.com](http://www.bryant-research.com)