



**SOCIAL MEDIA COMES OF AGE:
THE VOCUS 2011 PLANNING SURVEY**

Introduction

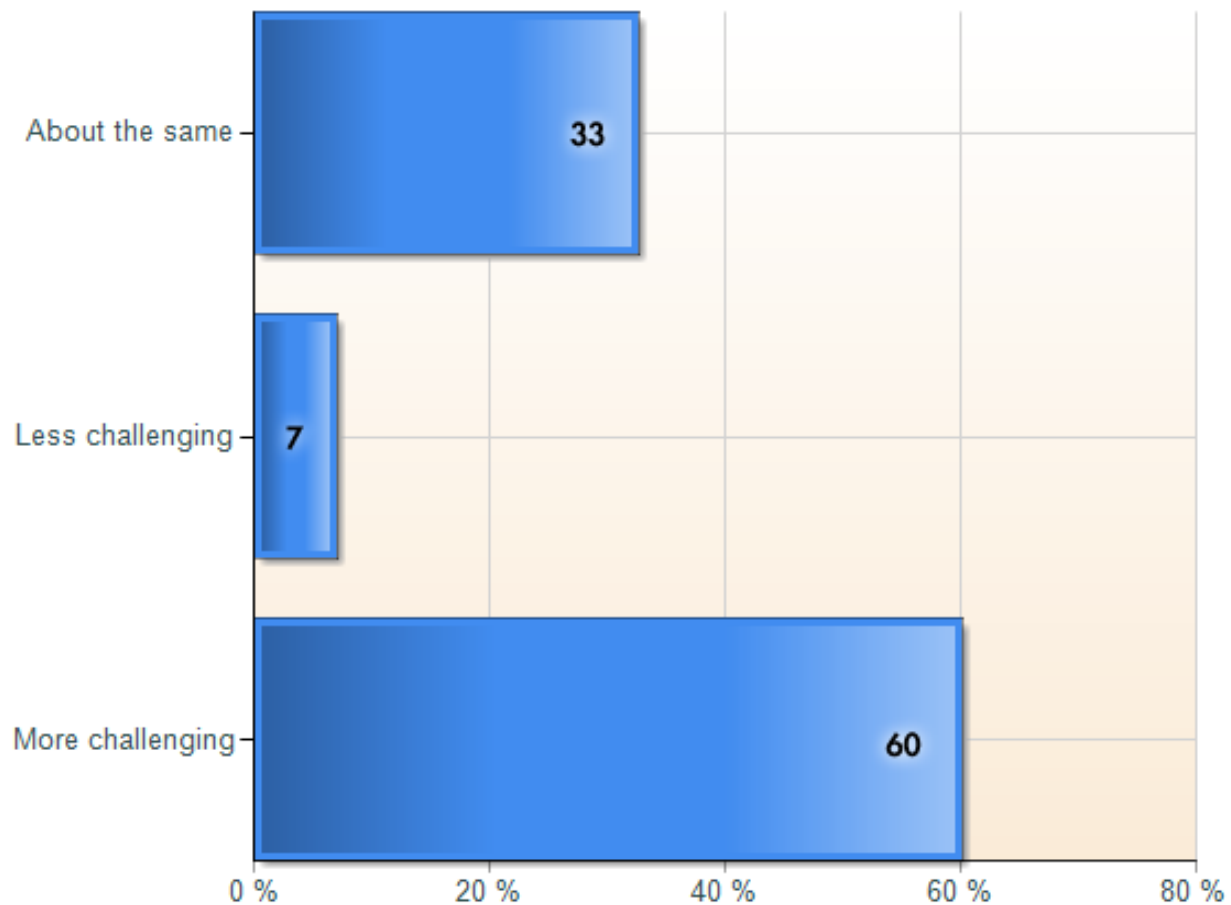
What a year 2010 has been!

It's brought new influencers, more influencers and we questioned the very definition of influence. Twitter rolled out advertising. Google waved goodbye. Lady Gaga got political and challenged a U.S. Senator on Twitter. Yahoo proposed to Bing. Search married social. Tiger Woods, um, didn't get married. The anti-social media guru emerged in the blogging community. Digg's new site brought us the broken axel rendered in the form of an oxen drawn #fail wagon. Duncan McIntosh re-launched Editor & Publisher. Vocus acquired HARO. @BPGlobalPR attracted 180,000 followers on Twitter. Mad Men Season 4; enough said.

What will 2011 bring? Vocus surveyed 508 professionals from October 26, 2010 to November 21, 2010 to find out. While about half of the respondents were PR professionals, the rest were comprised of a mix, including social media specialists, advertisers and search marketing professionals. A summary of findings include:

- **PR will be more challenging in 2011.** 60% of respondents said PR will be more challenging in 2011. The dynamics of social media and budgets were among the top reasons why.
- **Budgets expected to improve over 2010.** 42% said they expect budgets to "increase somewhat" or "increase significantly" versus 29% that said the same last year. In addition, 20% said budgets would "decrease somewhat" or "decrease significantly" versus 29% that said the same last year. Search professionals and advertisers were the most optimistic about budgets.
- **PR and marketing playing nicer in the social media sandbox.** 23% of respondents said marketing is leading social media efforts while PR is contributing, while 22% of respondents said PR is leading social media efforts with several other departments contributing. These two categories received the highest rankings among six options.
- **High marks for social media maturity on self-evaluation.** Organizations overwhelmingly gave themselves high marks for social media maturity, with 67% saying they are participating, sharing and contributing to social conversations.
- **Strategic communications and measurement among top priorities for 2011.** Social media (69%) strategic communications (66%) and measurement (61%) are the top areas where PR will focus more effort in 2011.

Note: The report stemming from last year's survey is freely available on SlideShare:
<http://www.slideshare.net/Vocus/us-p-rplanningsurveypdffinal>

Planning for PR programs and strategies in 2011 will be (choose one):**New year; new challenges**

Will planning for PR in 2011 be more challenging? The answer is a resounding yes and the responses are similar to the sentiment we captured last year.

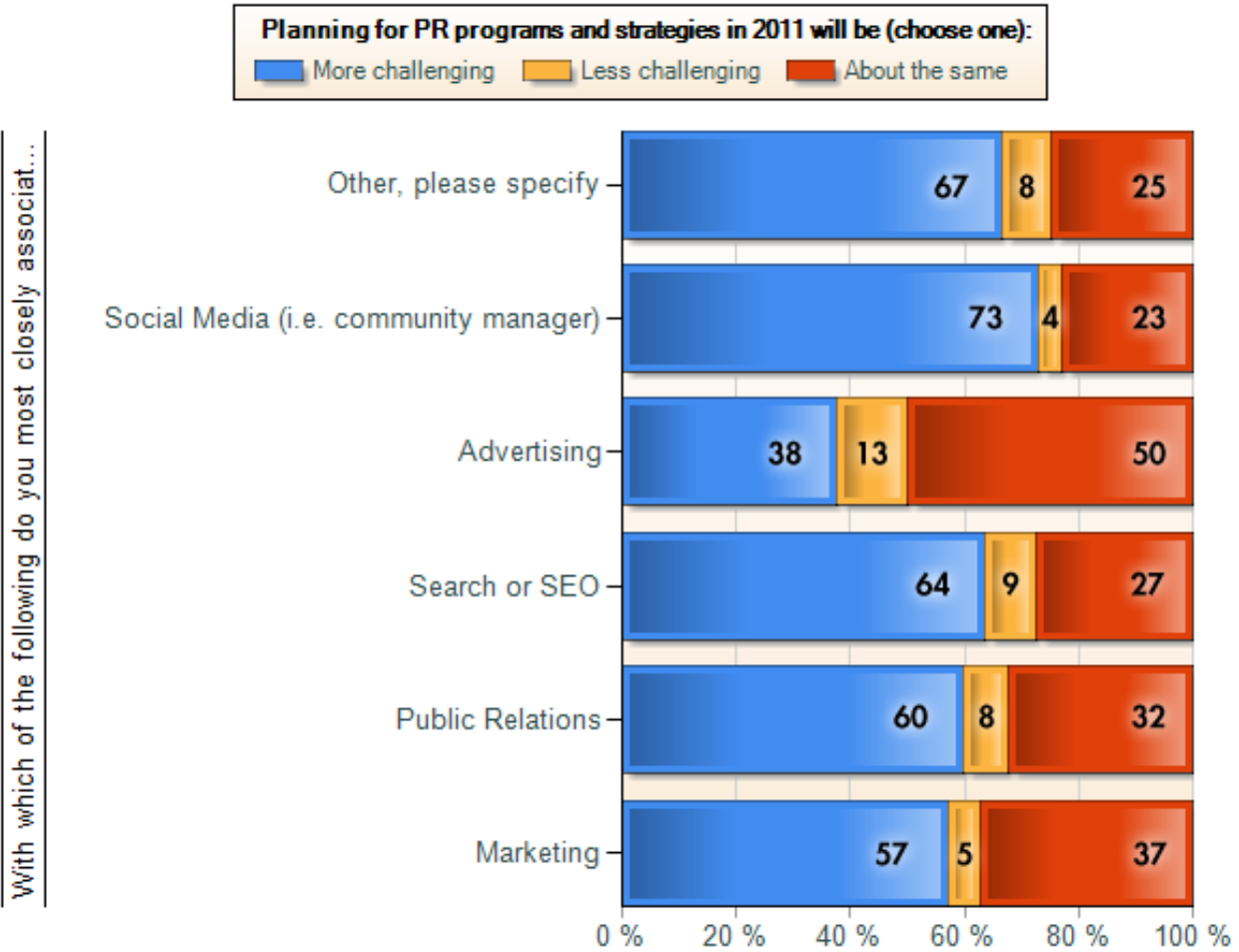
"We always challenge ourselves to go above and beyond the prior year's strategy," wrote one respondent. "But the same challenge is present each year."

Last year, 64 percent of respondents either "agreed" or "strongly agreed" that PR planning in 2010 will be more difficult, while 21% either "disagreed" or "strongly disagreed."

While we simplified the question on this year's survey, it indicates that the continuous evolution of PR and communications does make it more difficult for PR professionals to prioritize efforts including time, budget and other resources.

"With the new rise and trend of social media, it will be quite challenging to adapt to the ever so changing trends of social media in compliance to PR," wrote one respondent. "There are new ways of marketing and too many people [are] stuck in the Stone Age," opined another. "Social media is becoming a given, not a breakthrough tactic, so we need to up the ante," forecasted a third.

The last comment seemed reflective of the overall sentiment around answers to this question: you don't get cool points for merely being on Twitter anymore.



Social media professionals see the greatest challenge

A cross-tab analysis by function shows those respondents focused primarily on social media activities were the most likely to say (73%) planning in 2011 would be more challenging. Meanwhile, about half of advertisers say that PR planning in 2011 would be about the same.

“Let’s be honest, the planning process for any upcoming year is never ‘less challenging,’” stated one respondent flatly. “There’s always an amount of challenge that agencies and clients are faced with when looking toward and beyond the year ahead. It’s our ongoing challenge as PR professionals to approach the unavoidable uncertainty of the year ahead with creative, engaging and bold campaigns that build on what you’ve achieved in the past.”

media social pr budgets budget economy need clients money
 traditional changing challenging business challenge competition resources market
 people company marketing economic planning changes work limited tight changed
 options difficult strategy ways challenges strategies industry channels doing better
 outlets tools opportunities roi landscape different print smaller increased spend
 integrate communications platforms web spending getting expectations available
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 businesses environment growing target focus professionals tough tighter trying
 message public become strategic like good reduced demands product companies past looking
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Tag cloud analysis of 404 open-ended responses to the biggest challenges in 2011

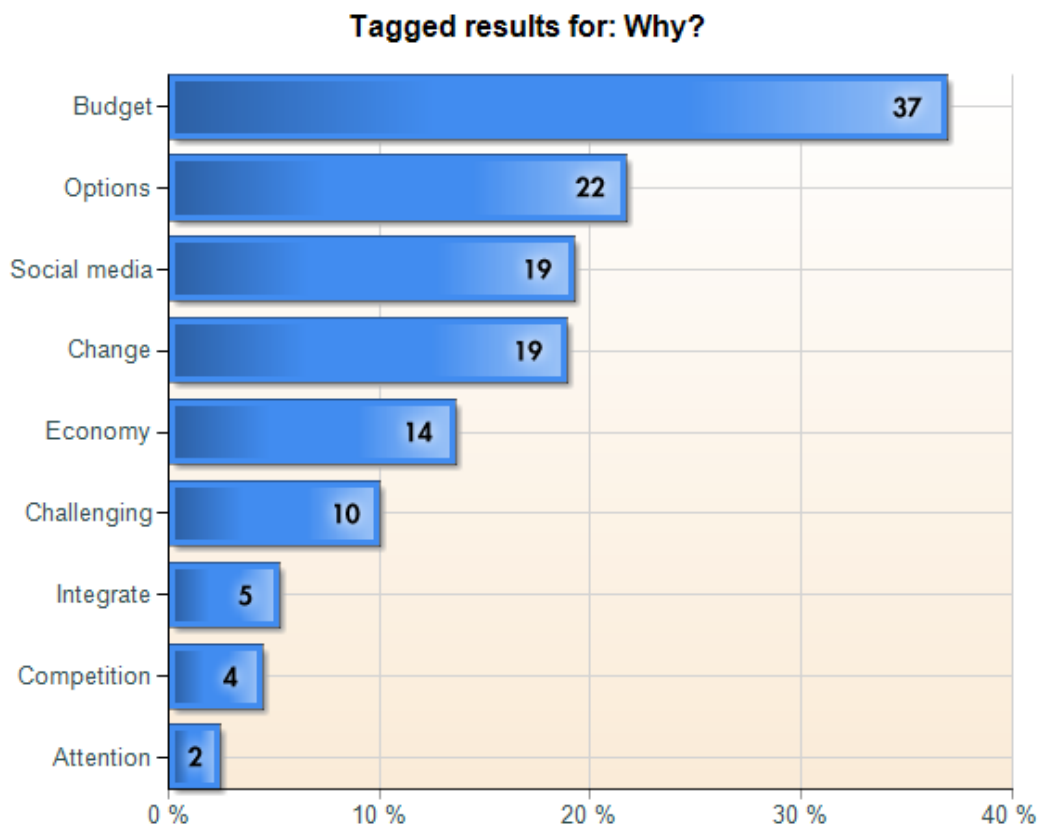
What are the biggest challenges?

Three words and two terms answer this question succinctly: social media and budgets.

A tag cloud analysis of 404 open-ended responses, like the commentary previously quoted, calls attention to these challenges. This reflects the reality that social media is dynamic and it is also not free – it requires a budget, and budgets are still tight amid the current economic climate.

Headcount is required to manage social platforms and tools. Tools – often premium tools – are necessary to properly measure social engagement. In addition, specific tactics like customized Facebook applications or multimedia often require complex programming – factors like these require budget.

While social media is the number one issue in the tag cloud analysis, budgets were much more prominent when we grouped similar terms together for an empirical perspective. Thirty-seven percent of respondents cited budget as the top challenge in 2011 (see chart below).



When similar phrases were grouped, budget emerged as the top challenge.

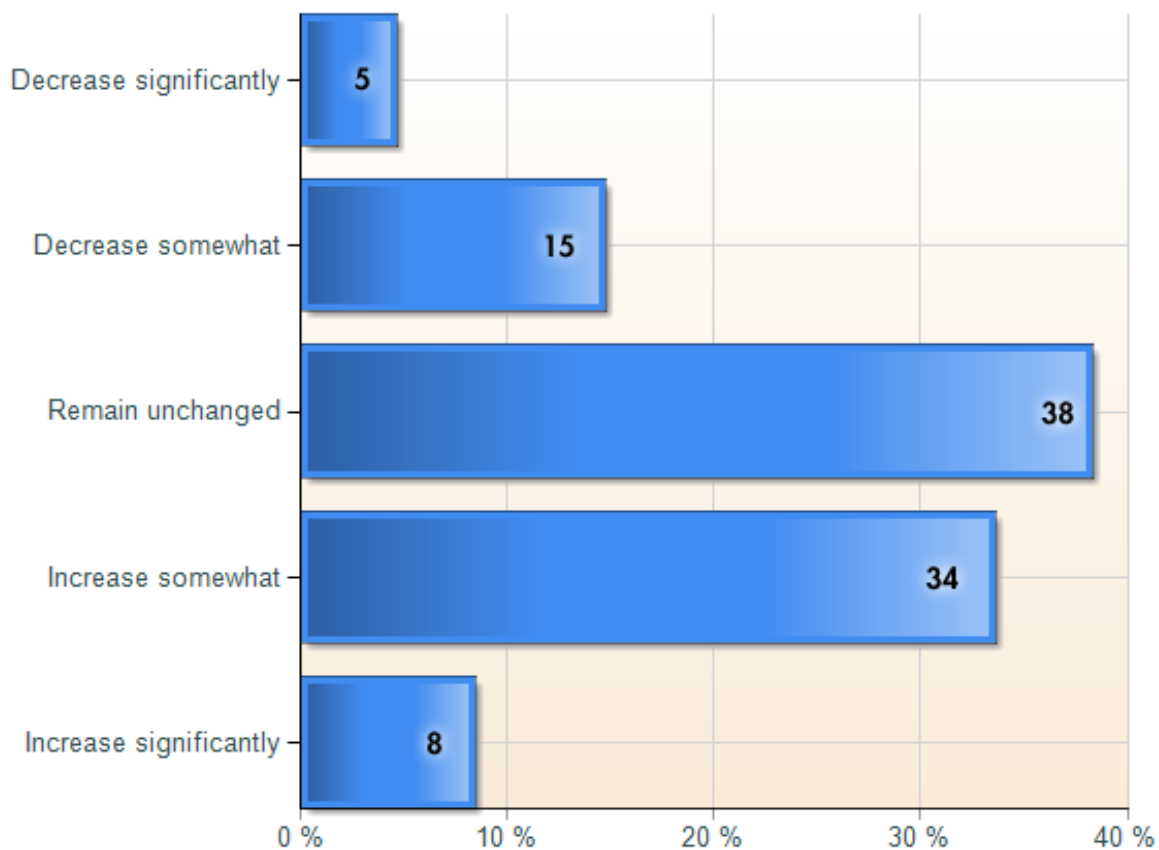
Change, competition, integration [of communications], options (as in variety) and attention were all also highly ranked challenges. Options and attention are noteworthy because of the correlation. Comments around options highlighted the explosion of content, which diversifies the information consumers have at their disposal: there's more resources competing for the same amount of attention.

Case in point? TechCrunch cites Google's CEO as saying more information is created every two days than humanity created from the start of civilization until 2003.

It's a reality that has not been lost on Vocus. In December 2009, our clients were using our news and social media monitoring tools on average, to monitor approximately 30 million clips per month. By June 2010, just six months later, and on the heels of launching our new social media monitoring platform, clients were monitoring 500 million or more clips per month. Indeed, attention may well have become a form of currency in the social media age.

Tags		
▶ Budget	Ignore Case	budgets budget money spend
▶ Social media	Ignore Case	social media
▶ Economy	Ignore Case	economy economic uncertainty
▶ Change	Ignore Case	Change Changing Changes Changed
▶ Competition	Ignore Case	competition competitor
▶ Challenging	Ignore Case	challenging challenge
▶ Options	Ignore Case	... channels outlets landscape print communications platforms environment
▶ Integrate	Ignore Case	integrate integration integrating integrated
▶ Attention	Ignore Case	attention

I expect my organization’s 2011 budget for PR to (choose one):



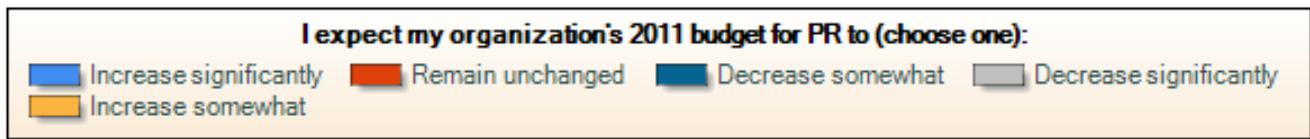
Greater optimism for budgets in 2011

While the overall study gives us reason to believe PR is poised to grow next year, more people (38%) responded that budgets will remain the same. The second highest response indicates that budgets might slightly increase (34%).

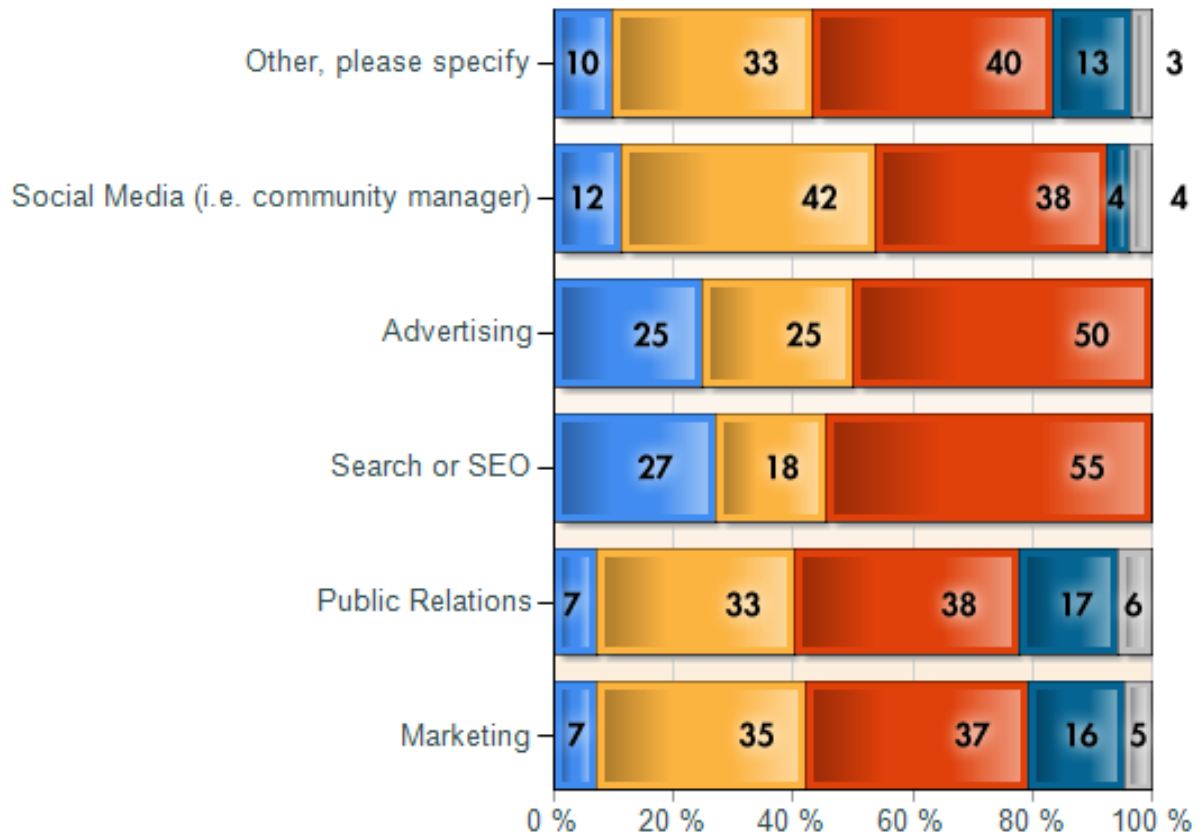
After experiencing program cuts and company downsizing for the past couple of years, marketing and PR still feels the restraints of the economy and will slowly ramp up with infrastructure or additional overhead.

“Budgets are still tight so doing more with less will continue to be a challenge,” wrote one survey taker.

Even so, respondents were generally more optimistic this year than they were last year. For example, 42% said they expect budgets to increase somewhat or increase significantly versus 29% that said the same last year. In addition, 20% said budgets would decrease somewhat or decrease significantly versus 29% that said the same last year; and finally, 42% said budgets would be flat vs. 42% that said budgets would be flat last year.



With which of the following do you most closely associ...



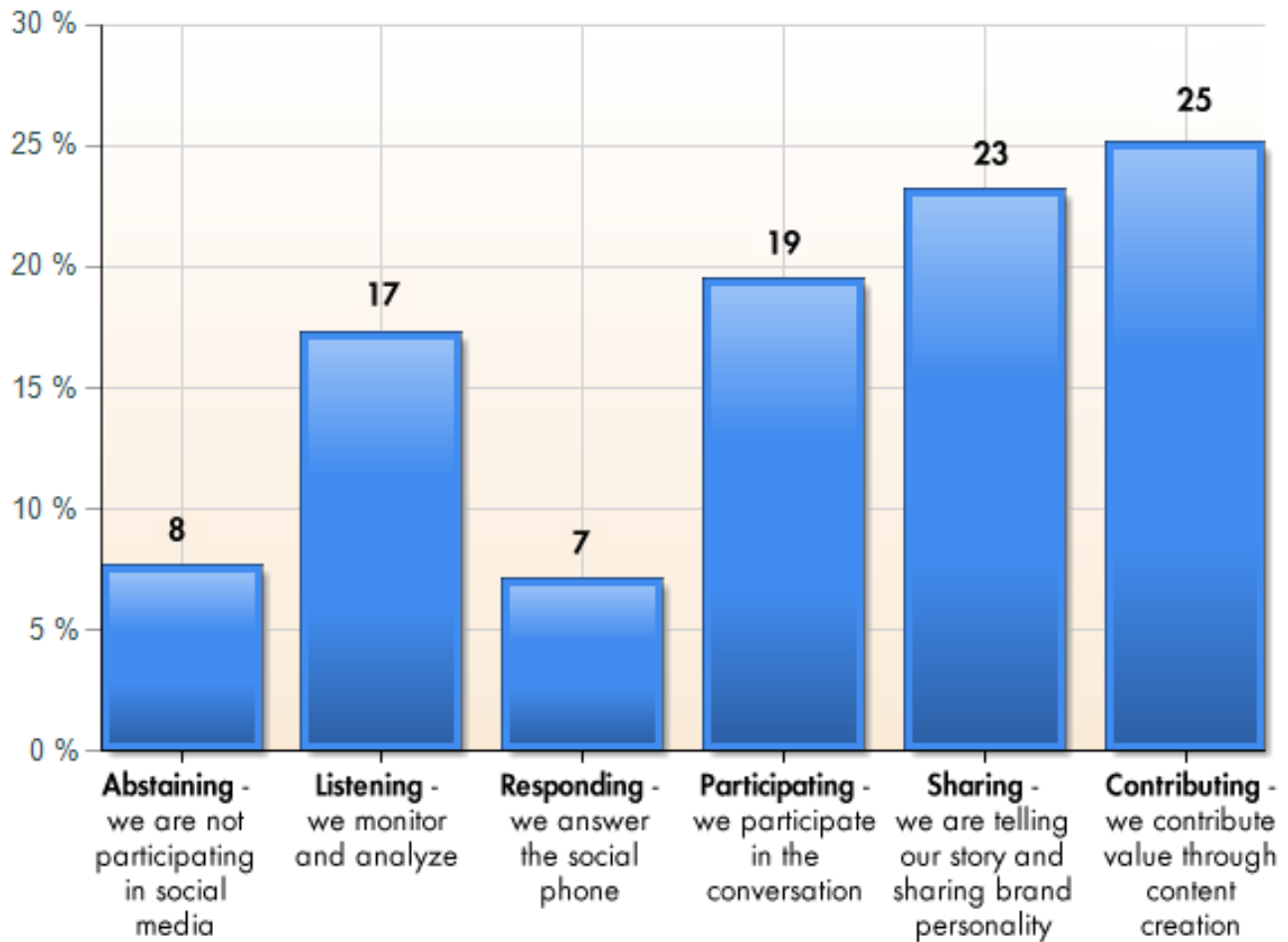
SEO and advertisers the most optimistic

A cross-tab analysis by function shows us two standout categories: advertising and SEO professionals. Twenty seven percent of search and SEO professionals expect their budgets to increase significantly in 2011, while 25% of advertising professionals expect to see their budgets increase significantly.

There's a social media angle to both search and advertising professionals. A November 2010 eMarketer study found that SEO, social media integration and paid search on social networks were top priorities for US advertisers in 2011.

"Search marketers have discovered how social media marketing can help build their search engine optimization efforts, and respondents to the Covario survey said their No. 1 priority for SEO next year was integration with social media programs," according to the study.

How would you characterize your organizations social media maturity currently (choose one)?

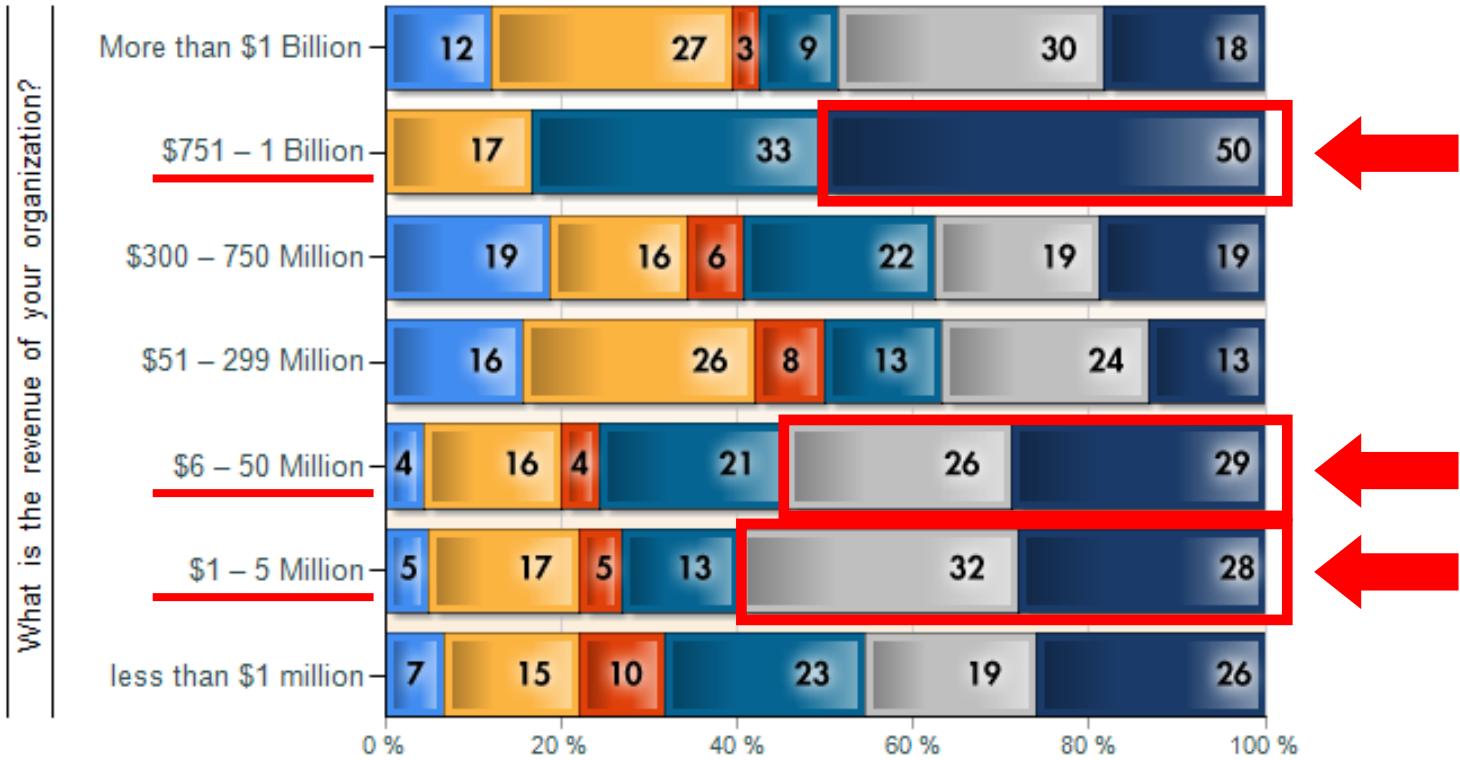


Despite social media challenges, organizations have given themselves high marks

Despite the challenges, 80% of respondents said social media will be more important in 2011, while 18% said it will be just as important and 2% said it would be less important.

We believe there are two primary reasons why social media will become more important: First, it's because companies have realized through monitoring efforts that conversations are occurring about their brands with or without their participation and second, because small wins in social media have led to more focused energy on improving those results next year. In 2010, organizations found that they can engage their customers successfully through social media.

Organizations overwhelmingly give themselves high marks for maturity, with 67% saying they are participating, sharing and contributing to social conversations. These responses are a testament that communications professionals and their brands understand the importance of participating, sharing and contributing in the social landscape. Although a smaller percentage of companies seemingly express apathy over participating in social media, most realize that social media is not a spectator sport. We expect to see these numbers continue to rise and the emphasis will shift to how companies are contributing to social communities.



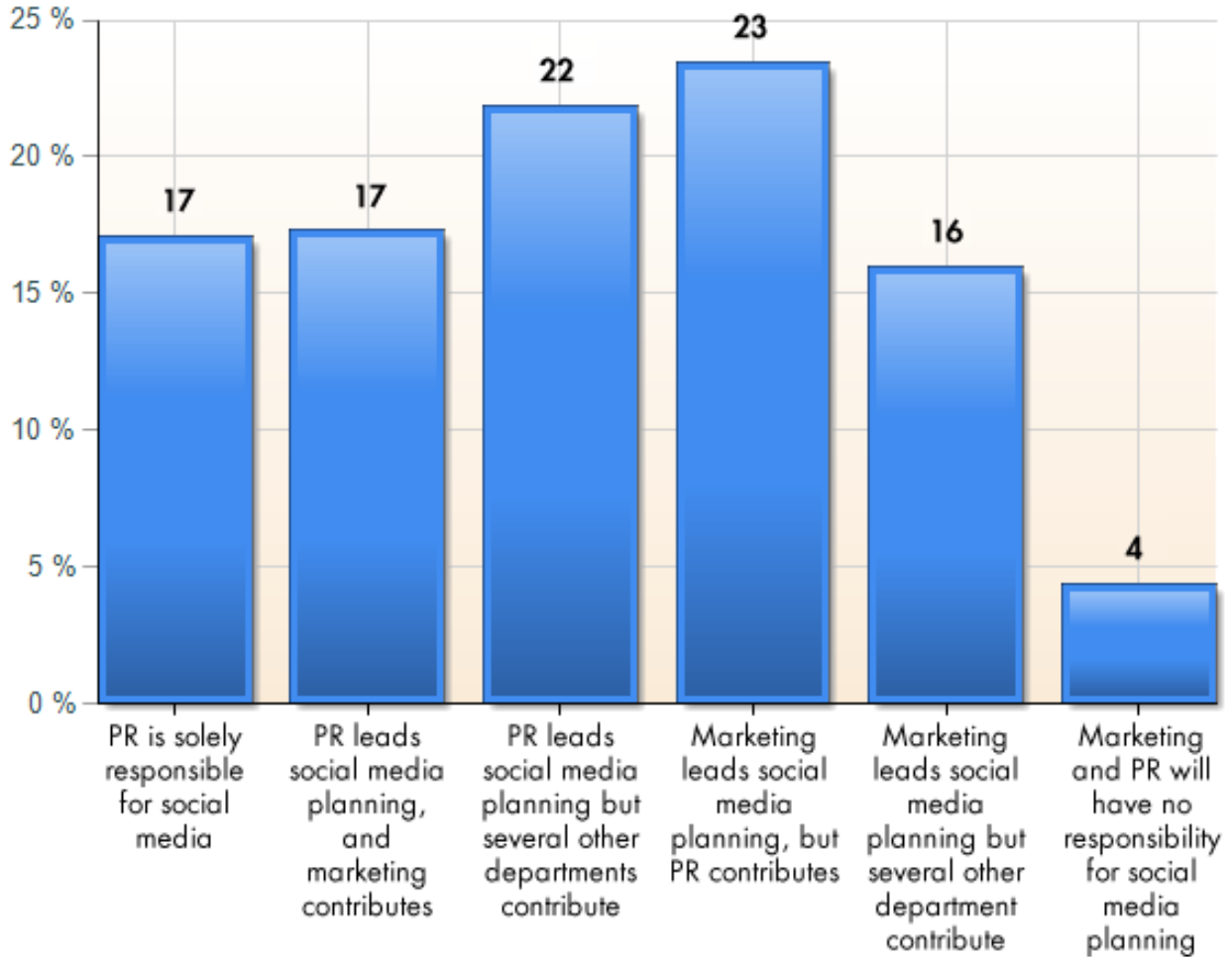
Organizations of all sizes express confidence with social media

A cross-tab analysis by revenue size shows that larger organizations are very confident. Small and mid-sized businesses follow close behind with 55% and 60% respectively saying they are either sharing or contributing. The participation was not necessarily proportionate to the budget (or funding for a program) based on the size of the company’s earnings.

The confidence in social media maturity, particularly among small businesses is reflective that these organizations have changed their expectations of social media.

“Many say their efforts take up more time than they had expected, although that percentage dropped from 50% to 43% between December 2009 and June 2010, suggesting companies are being more realistic about what’s involved in social campaigns,” wrote eMarketer in a September 2010 report.

Which of the following best describes your organization’s social media planning process in 2010 (choose one):



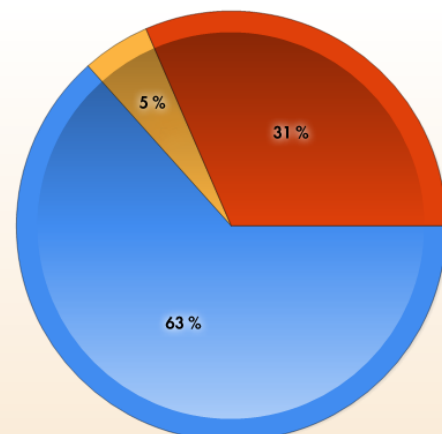
PR increasingly important to the marketing mix

Sixty-three percent of respondents said PR would be more important to the marketing mix in 2011. Thirty-one percent said it will be about the same and just 5% said it would be less important (chart right).

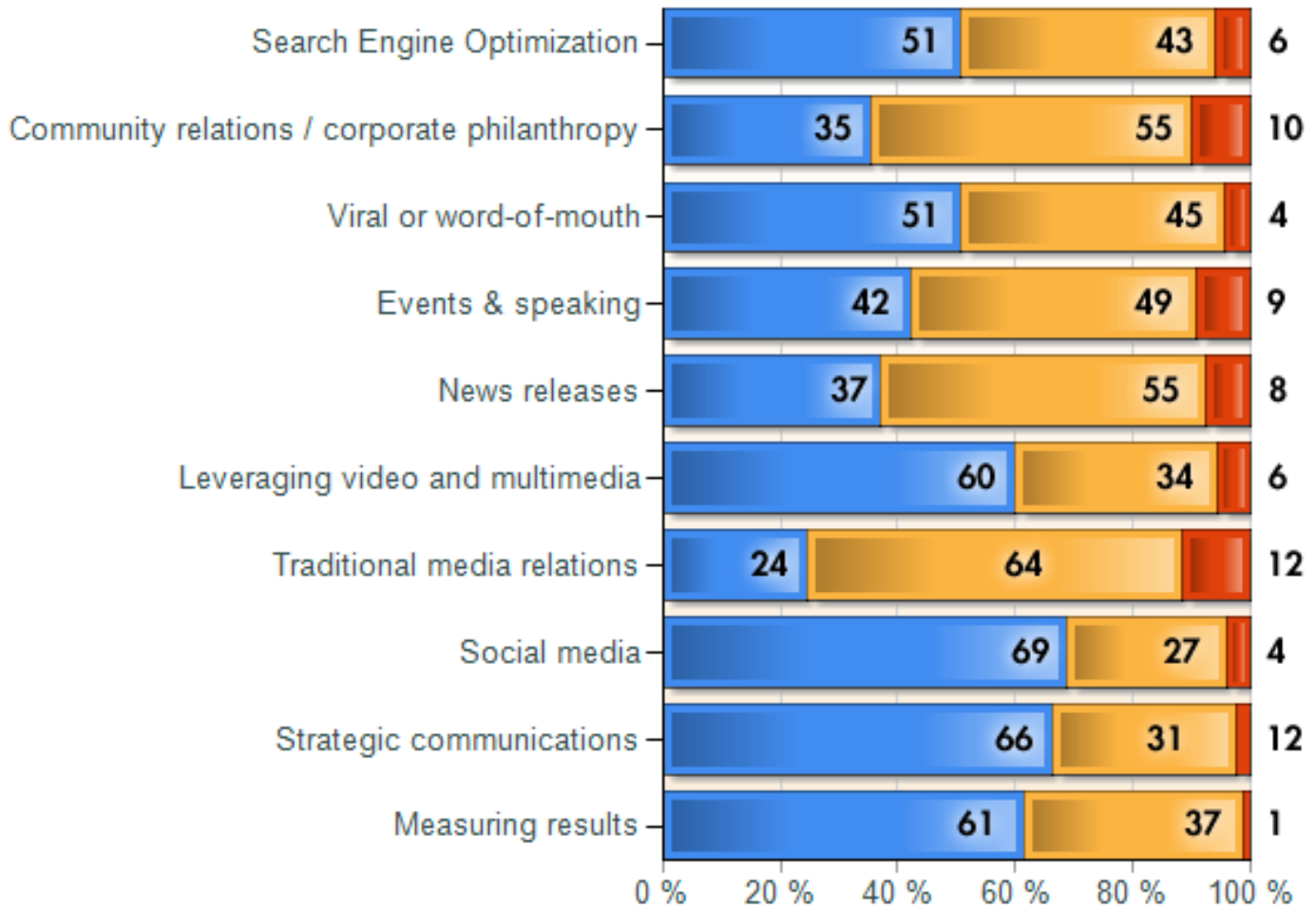
There’s good reason, too – since social media will have an increased emphasis, many organizations see PR playing an important role in leading organizational social media efforts. The two areas with the highest responses are where PR leads social media planning with several other departments involved and where marketing leads and PR contributes. While the responses are very close, it likely is dependent on who controls the budget for the program. It’s important to point out that this a welcomed indication that PR and marketing are getting along better in the social media sandbox.

As public relations proves its ability to communicate to the public through all different media, builds relationships, manage those relationships in different communities and guide all strategic communications for a company, we will see PR take more of a lead in social media planning.

In 2011, PR’s role in the overall marketing mix will (choose one):



In 2011, my PR organization will focus on (select "more | same | less" for each entry):
■ More ■ Same ■ Less



Where PR will focus in 2011

While PR’s role is growing in importance, these results show us where respondents think PR will focus its efforts in the year to come. These results also closely mirror a similar question asked the previous year. The only significant difference – one that changes by 10% or more – is social media.

In last year’s survey, 80% of respondents said they’d focus more on social media, while 18% said it would be about the same and 2% said they’d focus less. By contrast, this year 69% said they would focus more on social media, 27% said about the same and 4% said they’d focus less. That these numbers have dipped from year-to-year, may indicate that the gleam of social media has worn slightly. Good riddance to shiny object syndrome; social media is coming of age.

Despite the trials facing traditional media, its effect on the need for traditional media relations hasn’t changed much. Even as the media landscape changes, senior executives still want to see traditional media coverage as a part of the PR outcomes.

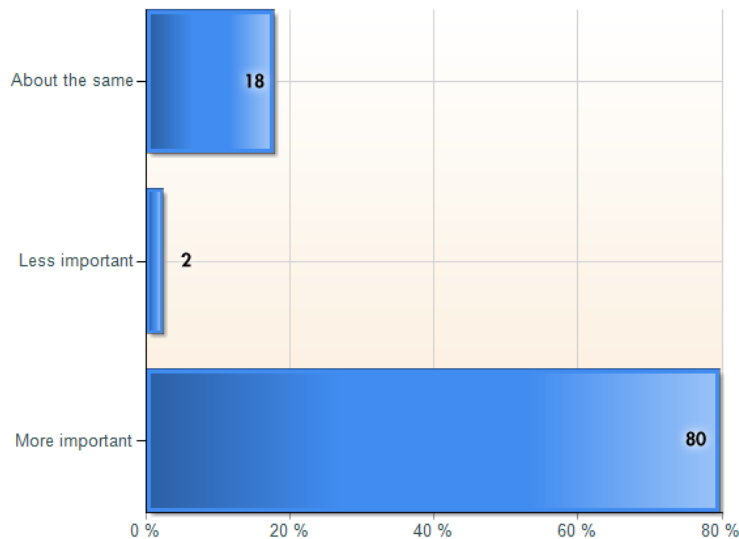
The increased focus on strategic communications moves PR forward and away from the stereotype that PR is tactical – merely writing and distributing news releases.

Measurement edged up slightly from last year, where 58% had said measurement would have a greater focus in 2010. This is consistent with the industry discussion on measurement this year.

News releases also edged up 5% from last year, which we'd surmise relates to the expanded capability of news releases such as the ability to add multimedia, social sharing, improved distribution, SEO value and increasingly improved analytics.

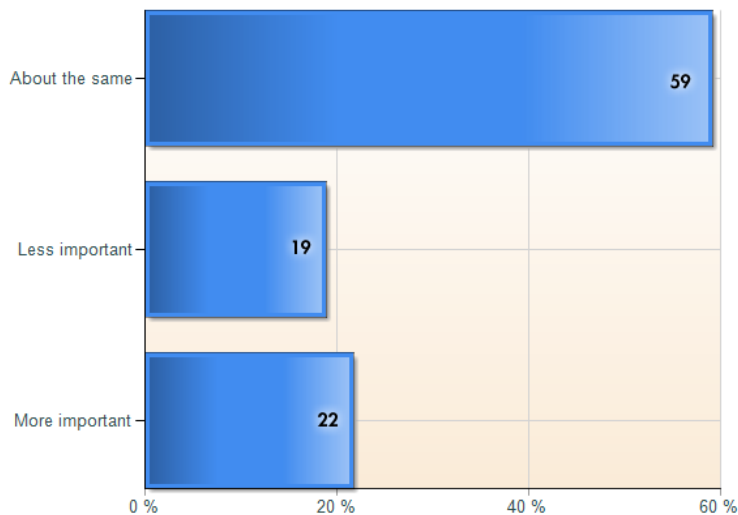
The importance of...

In 2011, your organization will see social media become (choose one):



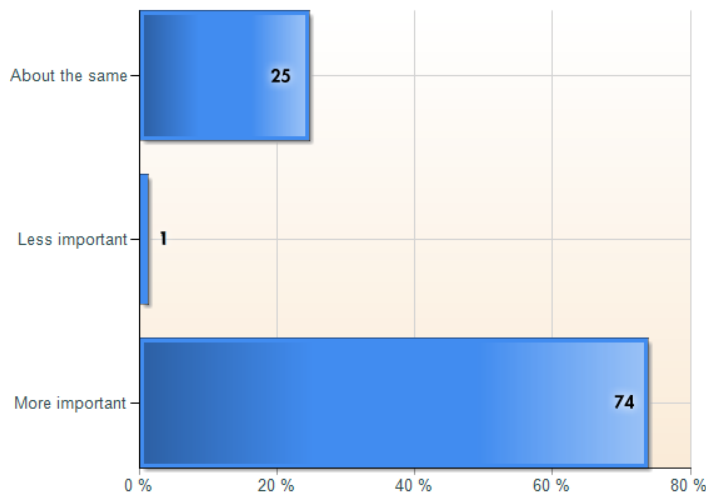
Social media, traditional media and the measurement are often essential parts of the PR professional's role. How important will these functions be in 2011?

In 2011, your organization will see traditional media relations become (choose one):



- **Social media.** It will be undeniably important to PR in the coming year. That sentiment was echoed throughout the survey. Eighty percent of respondents see social media as being more important in 2011.
- **Media relations.** The social web has certainly had a democratizing effect on the media. However, trusted, timely and reliable news sources are still incredibly important and relevant. Certainly social media can drive news coverage, but traditional news also drives social media. This is evidenced in how often we see headlines copied as Tweets. If PR people are finding their focus on media relations will remain consistent, it's likely because we've discovered how to connect with media that participates in traditional, digital and social media communities. Reporters create news content for both print and digital outlets – and further – often share even more

In 2011, demonstrating the return on investment for PR programs will become (choose one):

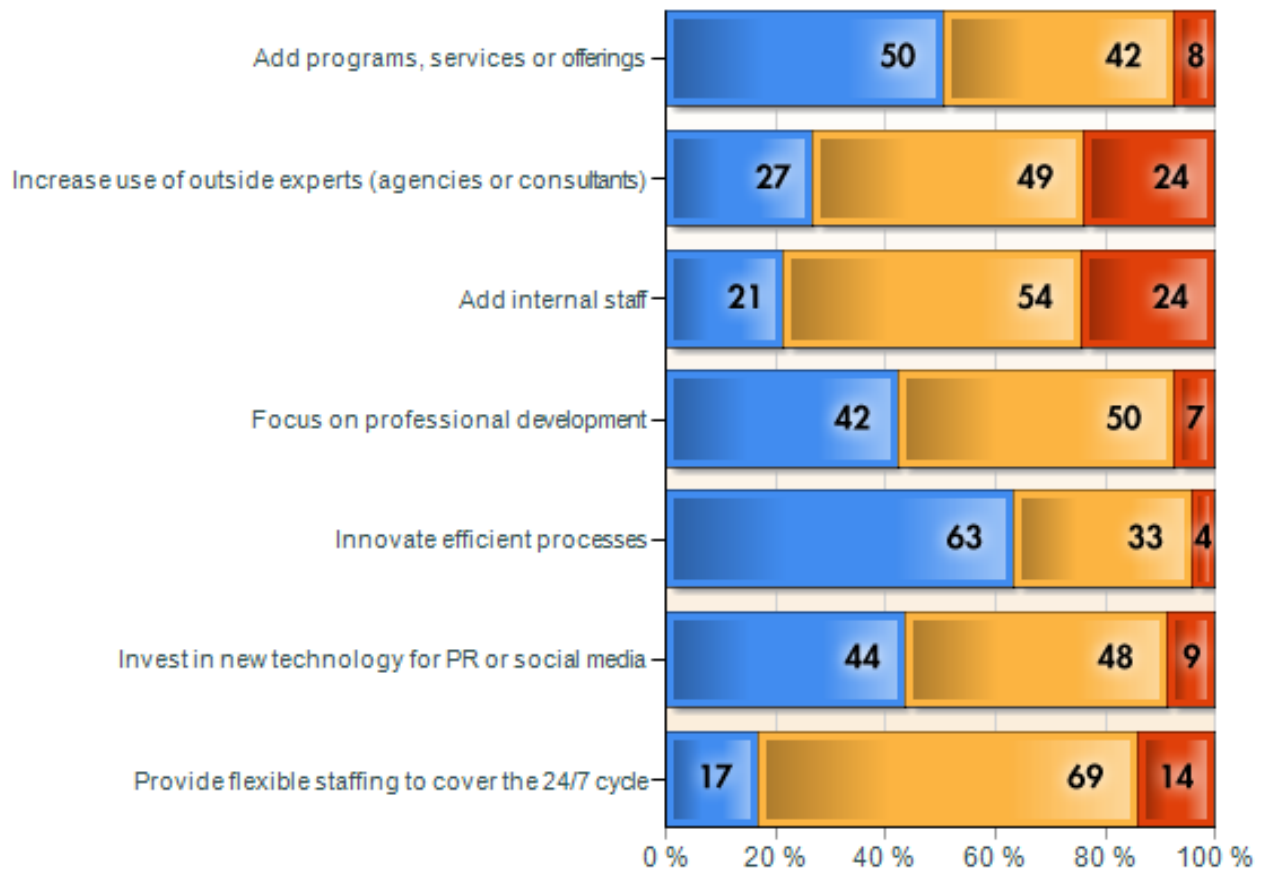


details in their blogs. We also realize that we have new ways to reach and interest them. Media relations will continue to be practiced with the same emphasis as prior years.

- **ROI.** Outcomes from media relations have always been a topic of some debate in PR circles. Social media has provided the ability to more empirically measure the march towards a business outcome. Web metrics, like click-throughs, referral traffic and interactions

In 2011, do you expect your PR organization to (select "more | same | less" for each entry):

More Same Less



are prime examples. The high response rate says that we know that we need to be measuring every form of communication in social media. Measurement is clearly a priority.

Reengineering process

In terms of where PR organizations will focus their energies, this year's results closely mirror those from the previous year. Innovating efficient process, for example, earned 63% of the tallies on both last year's and this year's survey. The packaging of new programs, services or offerings follows next, while professional development and new technology investment rank third and fourth.

We also feel there is a direct correlation between adding more programs and services, investing in technology, and innovating more efficient process. For example, when a PR organization adds social media services it requires both investment in monitoring software and an efficient reporting process for various departments within an organization.

media social pr focus increase better results work measure clients
 strategic business content engage communications releases marketing roi tools
 create listen efforts video traditional online target expand plan strategy company
 market measurement learn value opportunities spend invest staff services brand develop
 relations client promote attention message planning programs become development strategies
 relationships audience internal channels offer leverage technology information manage pay
 news overall person via networking platforms like coverage measuring community outlets
 level exposure needs implement increased provide harder smarter strategically gain actively
 utilize approach closely goals companies improve resources web conversation proactive
 management research branding concentrate mouth contact follow contacts grow monitor trends
 direct engagement effectively team methods tactics communication outreach outside job
 personal publications customer developing consumer important ahead professional best digital
 network incorporate activity events training reach share release website instead delegate

Investing in technology and innovating efficient process may also refer to how more companies are investing in internal social computing platforms for employees to collaborate, innovate and work on projects cross-functionally.

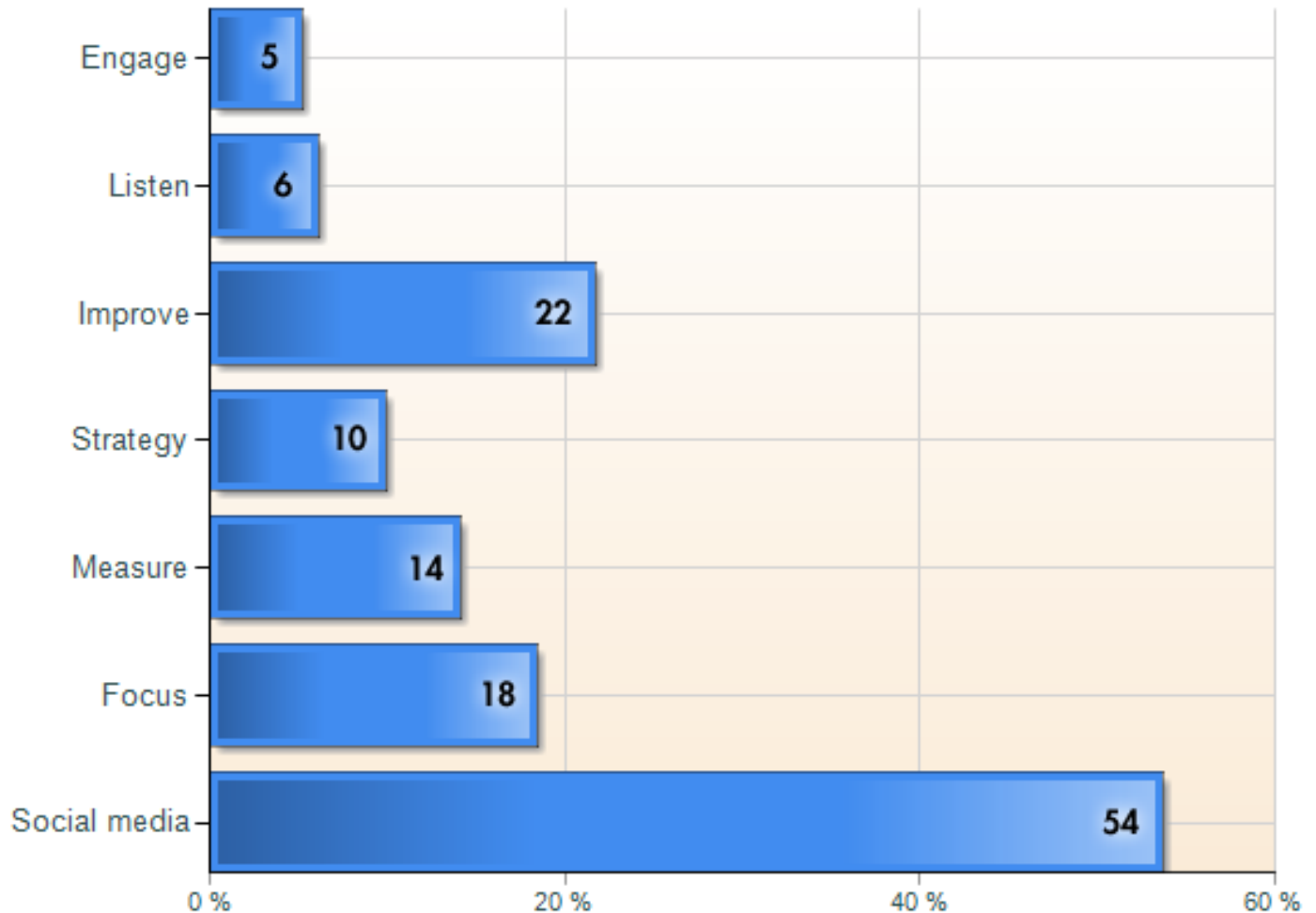
What will PR pros do different in 2011?

The tag cloud analysis above is derived from the final question of the survey – an open-ended question. No surprise that social media tops the list again. In fact, using just the words on the top line, we can almost construct a complete sentence:

PR will increase its focus on social media and measure better results.

Like the previous open-ended question, we also tagged similar phrases for an empirical look. The chart below reflects the results:

Tagged results for: What is the single most important thing you as a PR professional will do differently in 2011 than you did in 2010?



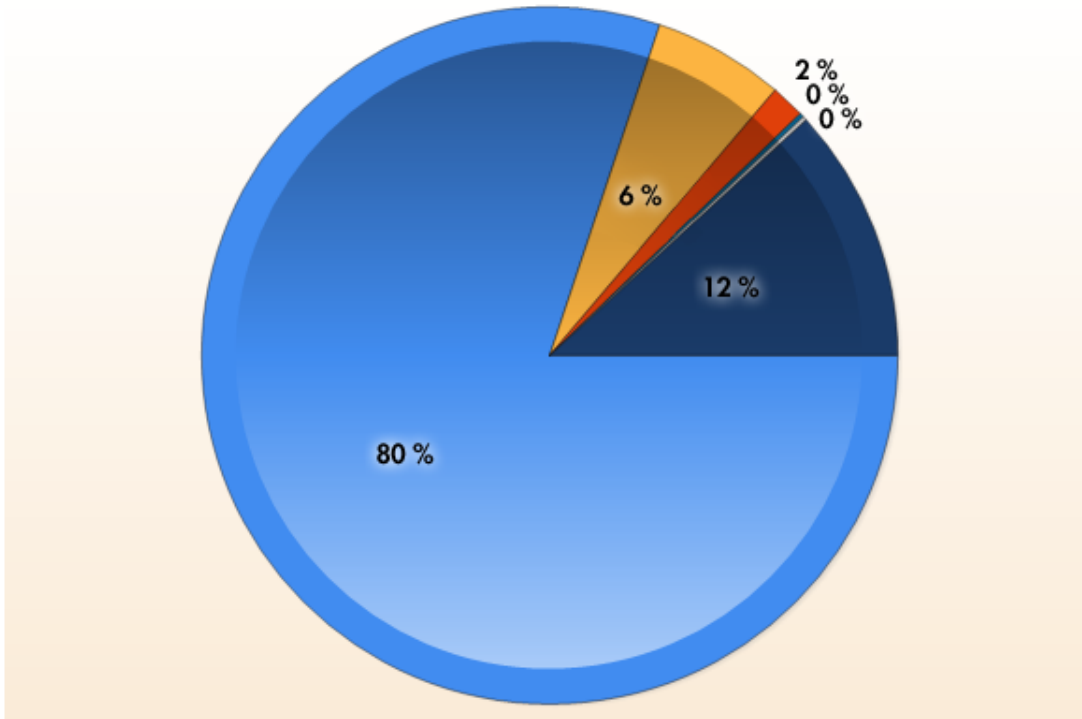
Demographics

Survey respondents were predominantly from the United States, fairly senior in experience and more than half most closely identify their role as public relations. Thirty-five percent of respondents work for corporations while 29% work for agencies – these two groups accounted for 325 of the 508 total respondents – and were the only groups asked to identify if their organization was B2B, B2C or B2G. The Web-based survey was conducted online from October 26, 2010 to November 21, 2010.

Media note: Members of the media, research or blogging community interested in specific cross-tab analysis based on these demographics should send an e-mail to fstrong@vocus.com.

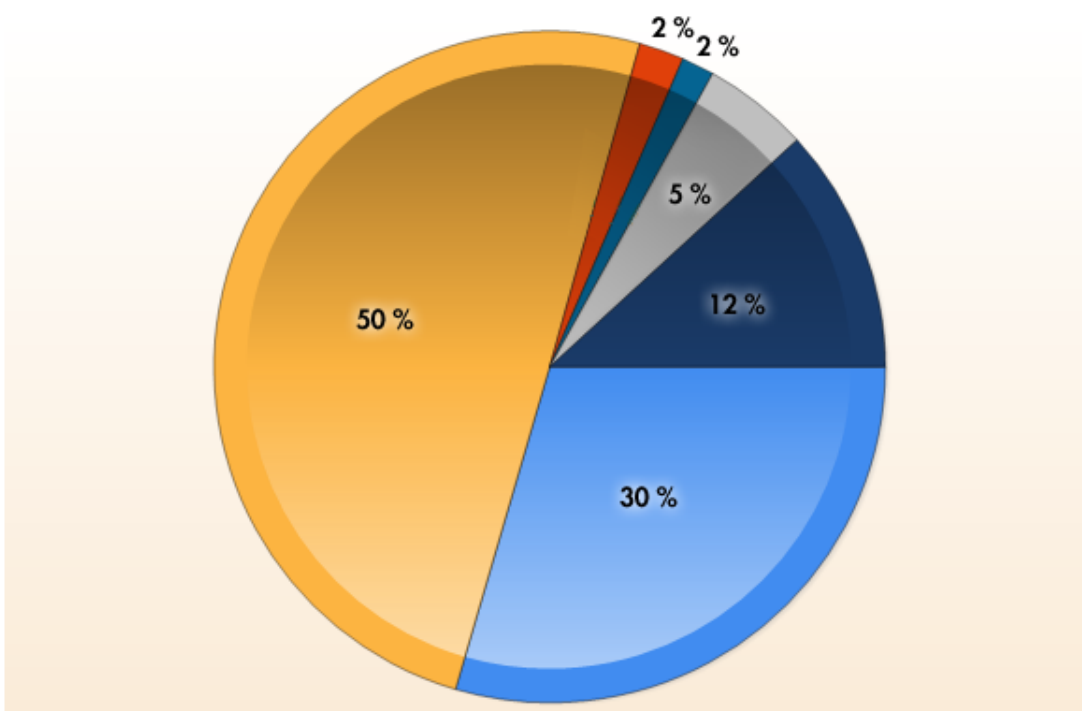
In which country do you currently practice?

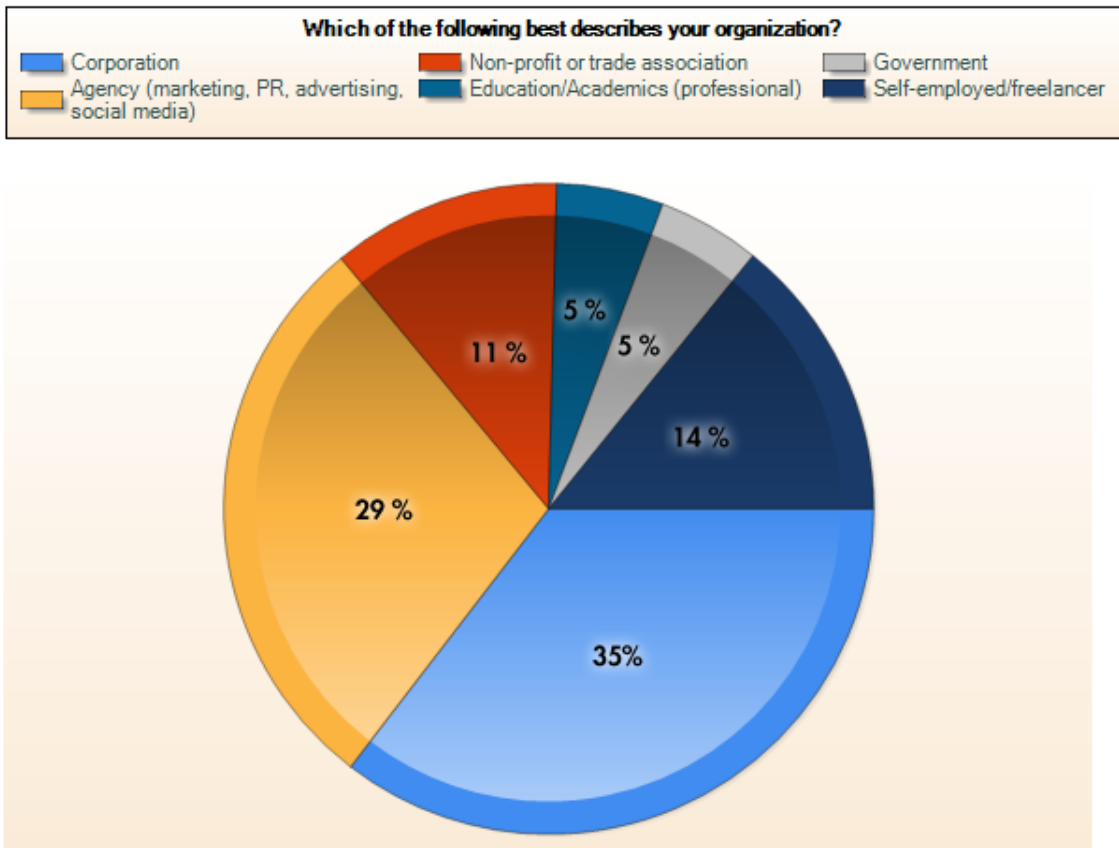
US UK Canada Germany France Other, please specify



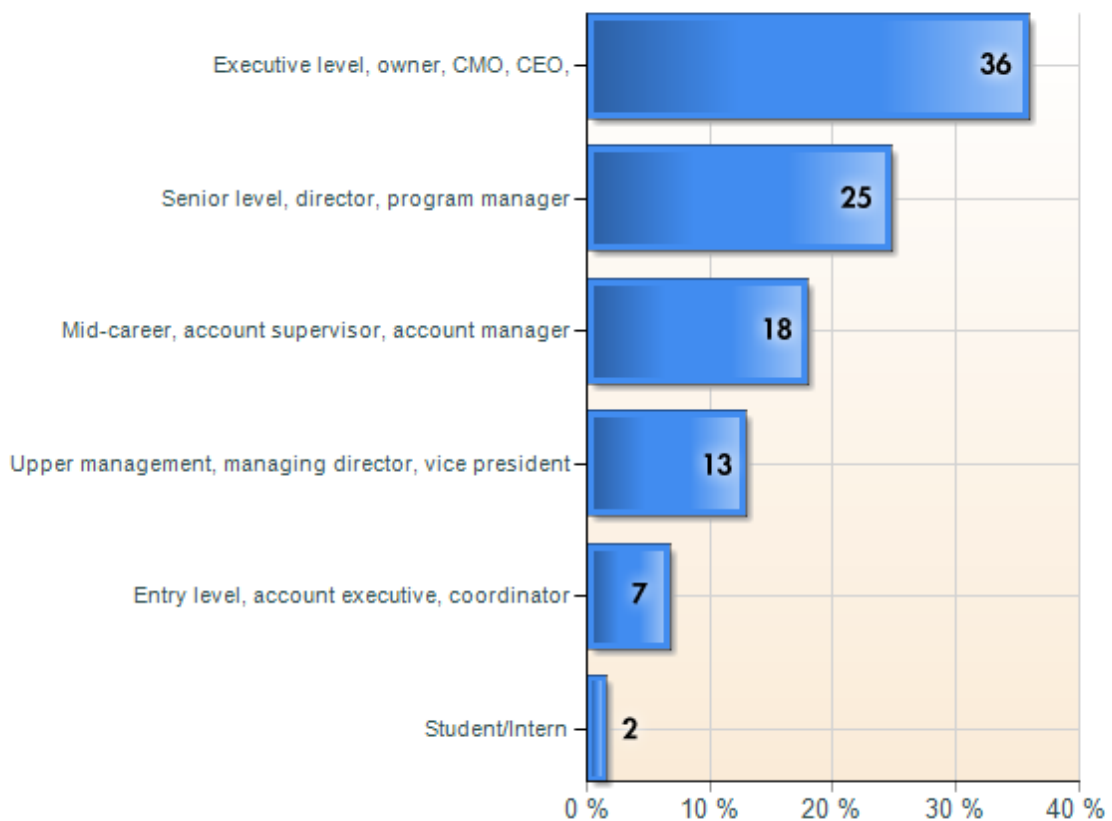
With which of the following do you most closely associate your role?

Marketing Search or SEO Social Media (i.e. community manager) Other, please specify
Public Relations Advertising

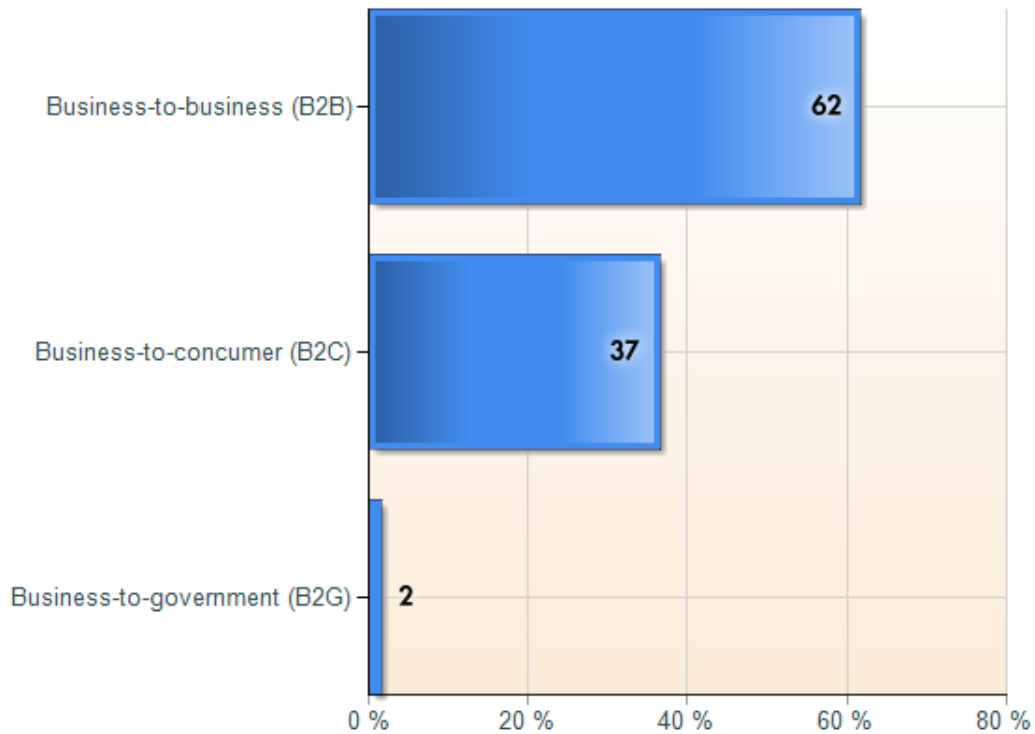




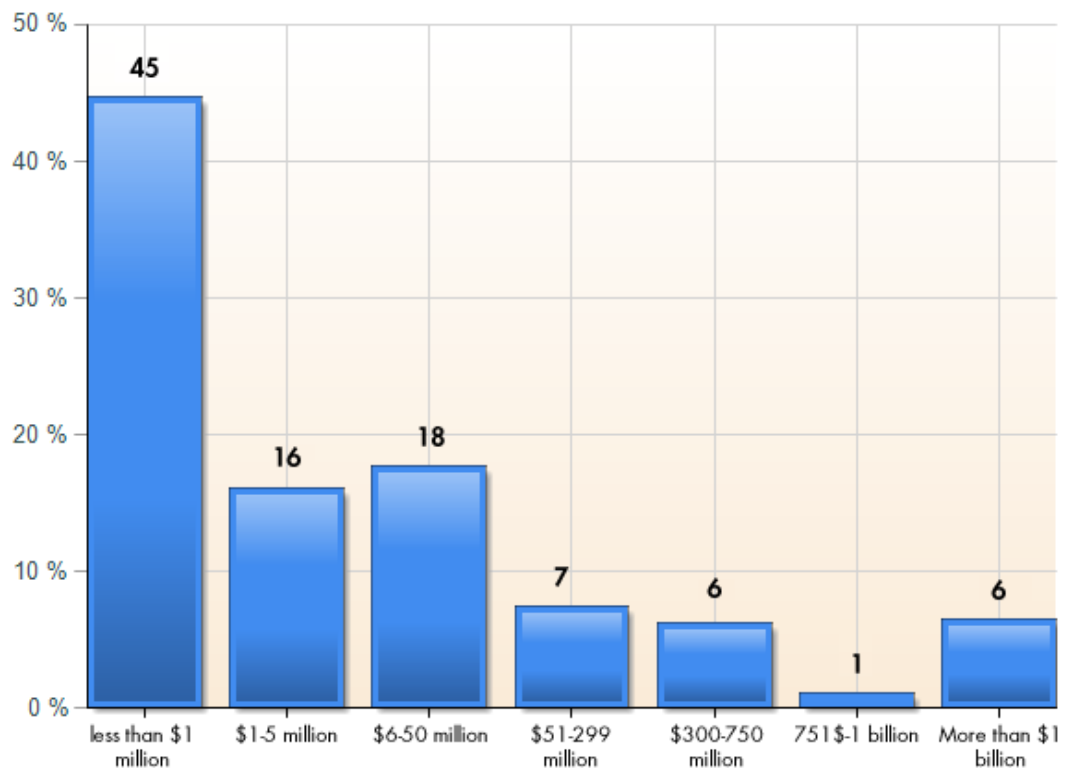
Which of the following best describes your role:



Which of the following best describes your business, or the focus of your business if you work for an agency:



What is the revenue of your organization?



About the authors

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Strong is the director of PR for Vocus (NASDAQ: VOCS), the leading provider of on-demand software for public relations management, and also, for PRWeb, the online news distribution service of Vocus. Strong has more than 12 years of marketing and PR experience, primarily for start-ups in the B2B space. He has worked both in-house and for agencies big and small such as The SheaHedges Group and Hill & Knowlton. He holds an MBA from Marymount University and an MA in Public Communication from American University.

Social Network	URL
Twitter (@vocus)	www.twitter.com/vocus
Facebook	http://www.facebook.com/vocus
LinkedIn	http://www.linkedin.com/groups?gid=1928001
YouTube	http://www.youtube.com/user/vocus15
SlideShare	http://www.slideshare.net/Vocus
Amplify	http://vocus.amplify.com

About Vocus

Vocus, Inc. (NASDAQ: VOCS) is a leading provider of on-demand marketing and PR software. Our web-based software suite helps organizations of all sizes to fundamentally change the way they communicate with both the media and the public, optimizing their visibility and increasing their ability to measure its impact. Our on-demand software addresses the critical functions of earned marketing including media relations, news distribution, news monitoring and social media. We deliver our solutions over the Internet using a secure, scalable application and system architecture, which allows our customers to eliminate expensive up-front hardware and software costs and to quickly deploy and adopt our on-demand software. Vocus is used by more than 30,000 organizations worldwide and is available in seven languages. Vocus is based in Lanham, MD with offices in North America, Europe and Asia. For more information, please visit www.vocus.com or call (800) 345-5572.

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