SOCIALSTRAT
Professional Social Media Strategy

SPECIAL REPORT:

How are the members of associations using social media today?

This is the first in a series of reports based on recent research that measures how the individual members of associations are using social media for professional development, networking and information.

Author: Terrance Barkan CAE, Chief Strategist at SOCIALSTRAT
Updated: January 2011

Introduction

We concluded two research projects to understand how associations and their members are using social media. The first study analyzed how more than **900 organizations** used social media. That survey produced some very interesting and insightful results:

- In the vast majority of organizations, no one person is being made responsible for social media (lack of accountability)

- Social media is being assigned to staff without removing any existing responsibilities (lack of adequate resources)

- The social media effort has no dedicated budget or staff resources in 90% of the organizations surveyed

- ROI and objectives are either not defined, or are not being measured (lack of a coherent strategy)

- Organizations are struggling to both measure and to grow engagement in their social media communities (challenged on execution and management)

Share this report with friends and colleagues!

But what about the members?

Having gained an understanding of how organizations are using social media, our most recent study sought to understand how the individual members of associations are using these new tools. In particular, we wanted to know how they are using social media in their professional lives for **networking, information gathering and professional development**.

We have collected responses from 8,367 individual association members representing 10 different associations that include the science, engineering, legal, management and medical fields. This report is the first in a series as we continue this long term research project to understand how association members use social media and to use that information to craft better strategies.

If you would like your organization to participate in this groundbreaking association social media research project, you can read more about how to participate at: **http://socialstrat.org/surveys/**

Please contact me directly if you would like to learn more about professional social media strategies.

Terrance Barkan CAE, Chief Strategist
SOCIAL**STRAT**
Direct +1 202 294 5563 | **tbarkan@socialstrat.org** | Connect!

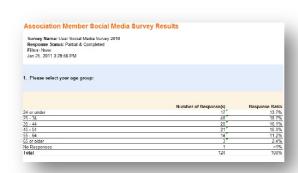# More About the Social Media User Survey Project

The Social Media User Survey is designed to build a significant baseline of information on how individual members of associations are using social media today. The insights and observations we gain from this data can be used to craft better social media strategies.

Participation in the research project is a free service to associations. Organizations that take part in the project receive a complete file of the data that is submitted by their members. The distribution of the survey questions is always under the full control of the participating association so that individual identifying information of their members is never exposed.

The survey questionnaire consists of 14 standardized questions that are used by each participating organization. Each association has the option to add up to 3 custom questions that are unique to their organization.

Each survey is branded with the association's identity and includes a custom welcome message for their members. Once the survey is approved, the association receives a unique link that they include in the survey invitation that the association distributes to its members. At no time does the member view any information other than what they receive directly from their association.

As the results come in, update reports are shared with the respective association and once an agreed period has passed, the survey is closed for that association. On a periodic basis, benchmark reports are produced and sent to the participating associations to compare with the data they have already received.

The overall objective is to create the largest and most representative database of how the individual members of associations are using social media and to use this information to craft smarter and more successful social media strategies. Our philosophy is to craft social media strategies based on real data and not to rely on popular wisdom, headlines or hype.

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If you would like your organization to benefit from being part of this project, you can request your free, customized survey at: **http://budurl.com/SocSurvey**

The Survey Questions

When crafting the survey questions, we wanted to make this survey accessible to a wide audience of associations. We also wanted to keep the survey relatively short to encourage members to submit answers with enough essential questions to deliver a meaningful result.

The 14 standard questions were designed to build a comprehensive picture of how members of professional associations are using social media, in particular: networking, information sharing and professional development. The results allow us to make the following observations:

1. What are the differences in social media use by age cohort?

2. Which social media platforms are being used and for which purposes?

3. How do members use social media in relationship to their profession?

4. Are members using the association's various communication platforms?

5. What is the member's level of competence in the use of social media?

6. How do members want to receive information from the association (including comparisons with traditional channels like direct mail and face to face)?

7. How much time are members allocating to different communication channels?

8. Which devices are members using to access social media and how do they feel about the devices that they use?

9. Does their employer have social media use policies in place?

10. Does their employer have a strategy for using social media?

11. Does the member have access to social media in the workplace?

12. How many contacts do members have through different platforms?

13. Who do members expect to teach them about social media?

14. What is their opinion about the association's level of technology competence?

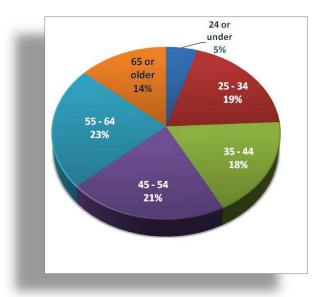15. How do members see their use of technology changing in the future?

The next pages review the results of the survey and focus on what the data is telling us when it comes to how association members are using social media today. Unless otherwise indicated, all amounts are displayed as a percentage for ease of comparison.
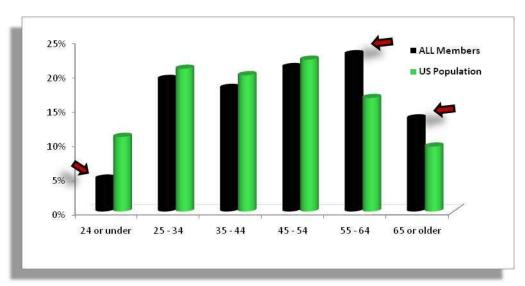
"Does age really matter?"

A great deal has been written about how different age cohorts use social media, in particular GEN Y (roughly defined as ages 15-28). Throughout the survey, we evaluated how behavior varies, if any, with each age group.

Respondents were grouped into 6 age brackets: 24 and under, 25-34, 35-44, 45-54, 55-64 and 65 and older. In general, members of associations are more heavily skewed to the older age groups with 58% of all members aged 45 years and older. Association members also skew older when compared with the general US population. Association members are also clearly under-represented in the 18-24 age group.

(Note: We used US Census Data for comparison. The US Census Data for the "24 and Under" category counted 18-24 year olds. See graph below.)

This difference in age distribution is likely due to people deciding to join a professional association later in their professional life as they become more serious about career advancement in a chosen field. For the purposes of the survey, we are interested to know if social media use significantly changes depending on age and how it differs.

Source: SOCIALSTRAT Member Survey and US Census Data

What did we find out about age cohorts?

We asked respondents to self declare their age and their level of social media competence. The way the question is asked separates those that are not using social media into three categories (bottom part of the grid);
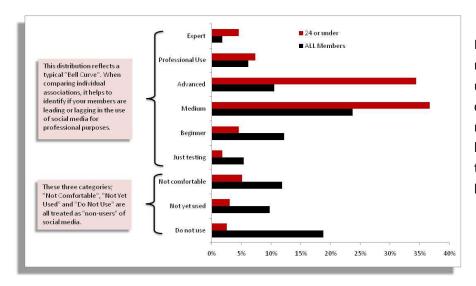
- those that "do not use" social media (and are unlikely to anytime soon),
- those that have "not yet used" social media (and are candidates to try it in future),
- those that "are not comfortable with it", indicating they have tried it but are no longer using it.

The top 6 categories classify varying degrees of social media competence and use. The results form an almost perfect "Bell Curve" with the majority of users declaring a "medium" level of knowledge. It also shows more than 50% of association members are at some minimum level of social media use.

As expected, younger age groups display a much higher proportion of social media use. This is evidenced by a higher declared use of social media and a greater amount of time allocated to social media use*.   (*See section on time allocated to social media use.)

Younger respondents are also much more likely to declare their level of social media competence as "Experienced" or "Expert" when compared with all respondents.
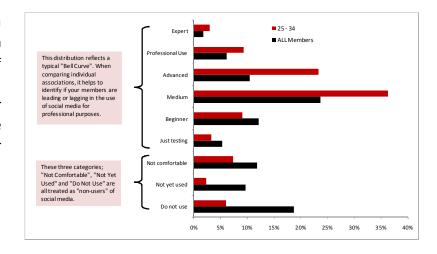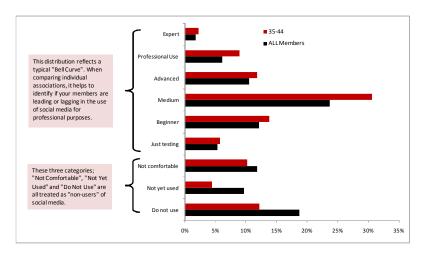
(See graphs below).

More than 50% of all respondents aged 24 or under declared their competence in using social media as "Advanced" or higher. Less than 10% view their level of use as beginner or lower.

25 to 34 year olds also report a very high degree of social media use but the declared level of competence reflects a more even distribution with a much higher than average percentage reporting a "Medium" or higher level of social media competence.
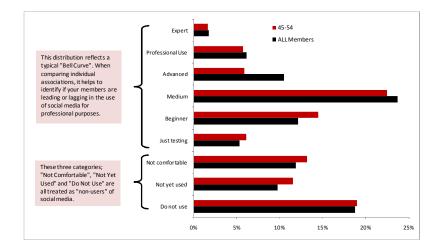

We observe that the 35 – 44 age group also reports a higher than average social media use and competence compared to the global population of respondents.
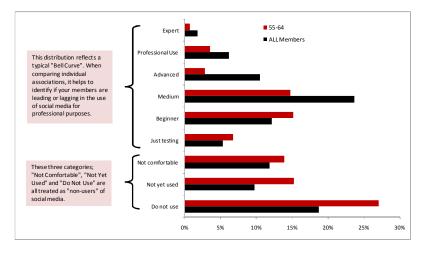

Note: For perspective it is important to remember that 24 or under represents just 5% of all association members on average and the 25-34 age group represents 19% of all members. If your association skews higher or lower in these younger demographic groups, it will have a direct impact on how you design and deploy social media.
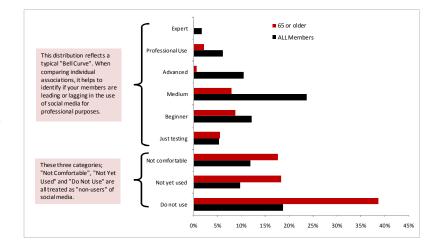
45-54 year olds reflect a slightly less than average level of social media use and are slightly more likely to be "beginners" in their level of social media competence.

This distribution reflects a typical "Bell Curve". When comparing individual associations, it helps to identify if your members are leading or lagging in the use of social media for professional purposes.

These three categories; "Not Comfortable", "Not Yet Used" and "Do Not Use" are all treated as "non-users" of social media.

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54 – 64 year olds, which represent the largest single cohort (23% of all association members) display a markedly lower level of social media use with 56% indicating that they do not use social media at all or are not comfortable in using it.

The 65 or older age group as expected shows the least amount of social media use and a more basic grasp of social media competence. Only 25% of this group is using social media at all. (Although that is higher than one might expect.)

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These three categories; "Not Comfortable", "Not Yet Used" and "Do Not Use" are all treated as "non-users" of social media.
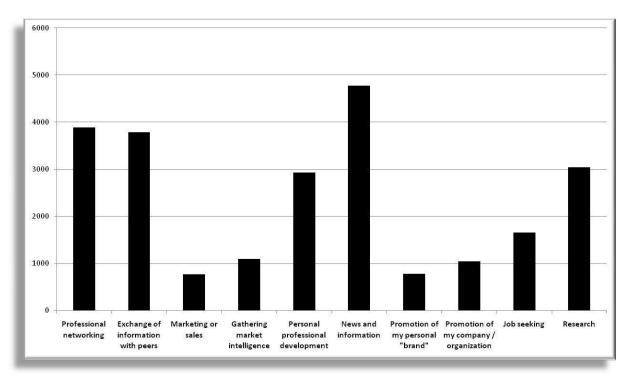
What are members using social media for?

As the above data demonstrates, there are large differences in the level of penetration of social media use and the degree of competence between the different age groups that we surveyed. However, what is most relevant for associations is how members are using social media for professional or association related purposes. In particular, for networking, information exchange and professional development; the primary focus for most associations.
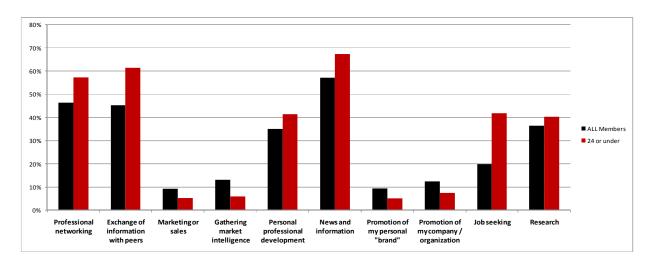

The survey data shows these are indeed the most important uses, including the use of social media tools for research purposes, followed by "Job Seeking". These responses support other established research into why members join and stay with associations.

When we compare the **purpose** for which social media is used by age group, we see there is no significant or meaningful differences based on age.
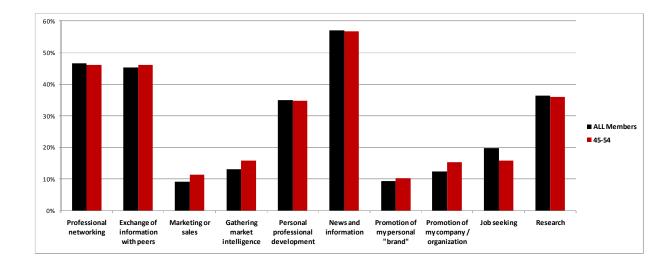
In the three examples below, we see that the most social media savvy group (24 years and younger) is using social media for much the same reasons as the entire survey sample; **networking, information sharing and gathering "news and information"**.
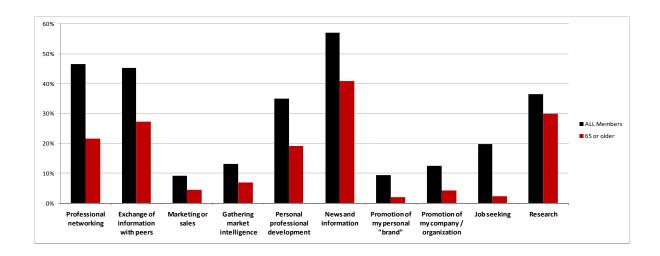
The 24 and younger group is using social media for a job search in a much higher proportion compared to the total respondent sample. They also score more highly in the networking and information exchange categories and lower in the categories related to traditional outward facing functions such as marketing, sales, market intelligence gathering and promotional activities.

The 45 to 54 age group represents an almost identical distribution to the global member data with slightly higher use of social media for the marketing, sales, market intelligence gathering and promotional activities.

At the other end of the age spectrum, the 65 years and older members reflect the same relative application and use of social media, although at much lower overall rates due to their much lower use of any social media tools at all. They also score much lower in the use of social media for job seeking as might be expected.

Based on the responses received, association members are universally using social media primarily for news and information, professional networking, exchange of information with peers, research and professional development.

The difference in age groups is less about <u>why</u> or <u>how</u> social media is being used and more about reach and penetration.

The survey data indicates that how members use social media content and functionality are largely similar for all association member age groups. This implies that there is not an obvious need to differentiate content based on age groups. As older individuals continue to increase their use of social media, an ever larger percentage of association membership will be reachable using social media.
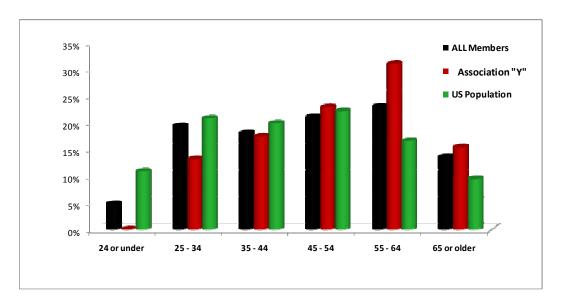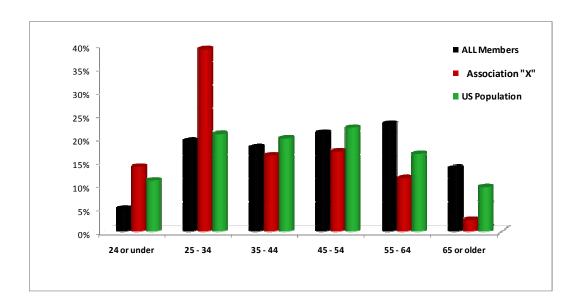
What does your membership age profile look like?

Not all associations reflect the same age distribution, with some skewing much younger and others with an ever greater weighting of more mature members. It is important to understand the demographic distribution of your membership to better understand how best to apply a social media strategy.

The graphs below illustrate how different associations have very different demographic member profiles (actual examples of two participating associations are used):
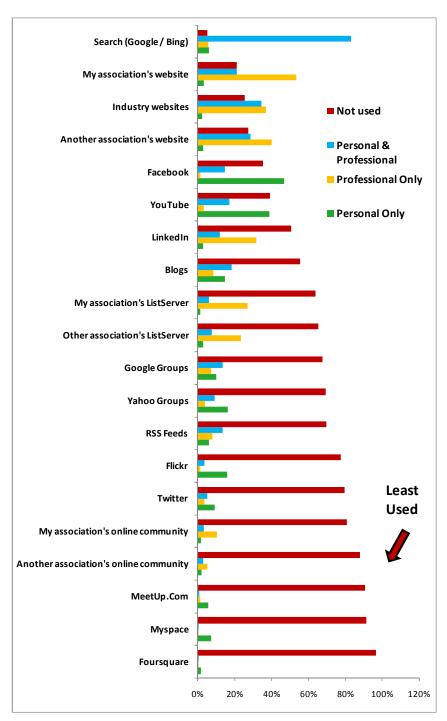
Which tools are members using to access social media?

We wanted to understand which social media tools members are using and what they are using them for. We also wanted to understand which physical devices people are using to access social media and how they felt about the devices they are using.

This graph displays the chart of 20 different social media and online tools used in decreasing order of frequency.

The most used online application is "Search" which underscores the importance of good SEO (Search Engine Optimization).
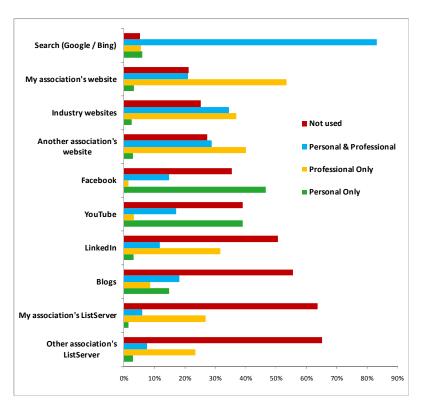
The use of websites as a major source of information (the association's, industry related and other associations) highlights the importance of up to date and relevant content.

The relatively low scoring of association online communities is an indication that associations may be having difficulty in building traction for their member only communities.

The "Top 10"

If we look at the "top 10" platforms being used and focus on those that are used for professional purposes, the association website is the clear leader as a source of information.

There is also a high use of "industry websites" which indicate for-profit and third party sources are highly used. Associations should be visible on these third party sites because that is where the members are investing a significant amount of attention.

Although highly used, Facebook is predominantly for personal use only (47%) with only 15% reporting that they use Facebook for both personal and professional purposes.

LinkedIn, which is less frequently used overall, is predominantly used for professional purposes (32%) or both professional and private (12%). These results confirm the very different audiences and objectives of these two highly popular social networks; Facebook primarily for personal use and LinkedIn for professional networking. Note: depending on the profile of your particular association members, you may find that Facebook is the preferred platform for professional networking in your sector.

Listserves (an automated email distribution and discussion tool) is largely seen as an antiquated application, however, this tool is still widely used by members for professional purposes. Associations need to carefully plan any transition from legacy platforms, including Listserves, to ensure that they do not lose what is valued by members who use those tools.

It is important to measure which platforms your members are using and for which purposes in order to know where you need to apply your scarce social media resources.
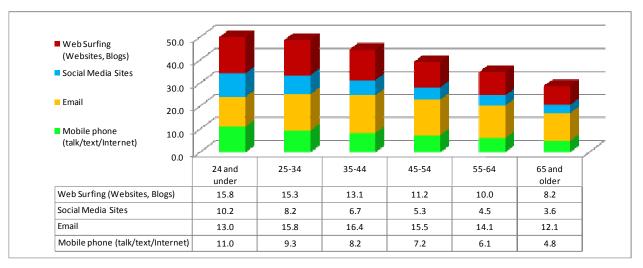
How many hours do members spend "connected" each week?

We asked respondents to self declare the number of hours, on average, they spend per week on each of the following: a.) web surfing – viewing websites and blogs, b.) social media sites (such as Facebook or LinkedIn, c.) using email and d.) mobile phone use (including talk, text and Internet over the mobile device.

Based on the responses received we see that there is a steady decline in total time allocated to online or mobile use as respondents increase in age. The 24 and younger group estimates that they are spending a impressive 50 hours each week in online, email or mobile phone use.

	24 and under	25-34	35-44	45-54	55-64	65 and older
Web Surfing (Websites, Blogs)	15.8	15.3	13.1	11.2	10.0	8.2
Social Media Sites	10.2	8.2	6.7	5.3	4.5	3.6
Email	13.0	15.8	16.4	15.5	14.1	12.1
Mobile phone (talk/text/Internet)	11.0	9.3	8.2	7.2	6.1	4.8

Even in the 65 and older age group we see that on average, 28.6 hours of every week is dedicated to staying connected in one form or the other. Regardless of the age group analyzed, a very significant portion of the average week of an association member is dedicated to some form of communication.

With the exception of the 24 and under age cohort, email is the most time intensive activity followed by web surfing (the number one activity of the youngest age group), mobile phone use and finally, social media sites. Contrary to some popular reports[1] and other studies that have measured social media use by the general population, dedicated social media sites garner the least amount of time from association members.

[1]According to the March 2009 report from the Nielson Company, social media and online communities overtook email in terms of amount of time applied. Our survey results would seem to indicate that association members behave differently than the general population of internet users. An important consideration when designing an online strategy.
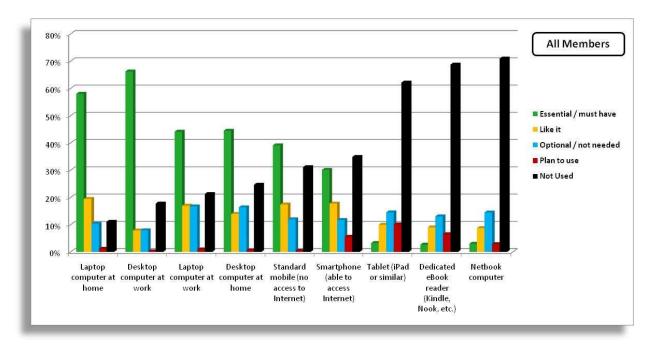
Which technology are you using and how do you feel about these tools?

We asked respondents to express how they feel about the use of different technology devices. We asked respondents to describe the devices they use as; essential, liked, optional, planning to use or not used.

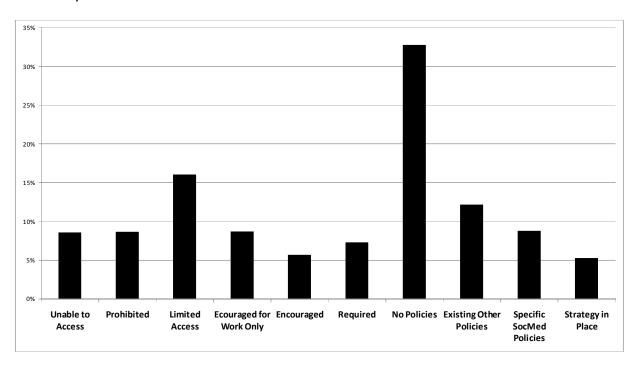The results for the entire survey sample are listed in decreasing order of use.

- 24 and younger members emphasized laptops for home use (73% rated them as "essential") and *standard mobile phones (52% as "essential" and 18% as "Liked"). *Includes texting.
- 25-34 year olds saw a marked drop in the use of desktop computers at home (only 22% rated as "essential")
- 35-44 year olds indicated a greater affinity for smartphones (39% rated it as essential and another 20% "like it")
- 45-54 year olds closely tracked the overall average with a slightly higher use of desktop computers at work (72% rated as "essential" compared to the overall average of 66%)
- 55-64 year olds were least likely to use a laptop at home and most likely to use a desktop computer both at home and in the work setting
- The 65 and older group were least likely to use a smartphone (65% reported not using)
- All age groups indicated the intent to upgrade to smart phones, tablets and e-readers. On average, 10% of respondents planned to obtain a tablet (iPad or similar) with 12% of the 35-44 year-old group responding positive to this question.

Social Media Use Environment

We asked respondents to describe their access to social media in their work environment. Respondents were allowed to answer with the responses that best described their environment. The percentage response was calculated against the total number of respondents in the survey.

A relatively small 9% of respondents are unable to access social media at work while the same number are expressly forbidden by their employers to access social media and a further 16% indicate that they have limited access.

At the same time, 22% of respondents are either encouraged or required to use social media for work purposes.

A striking 30% of all work environments have no policies at all regarding the use of social media and that a further 12% use other existing work policies to govern social media use while 9% report having social media specific policies.

Only 5% of respondents indicate that their employer has a social media strategy implemented.

This is one area that we project will rapidly evolve as social media business strategies become a requirement to compete and the need to manage potential legal risks will require social media specific policies.
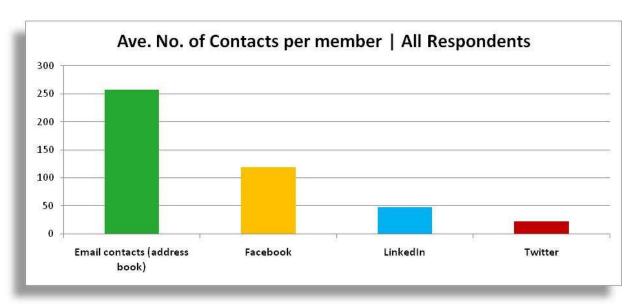
How many contacts / followers / friends do your members have?

Social media is in large part about making peer to peer connections and forming personal networks. According to Metcalf's Law, the value of a network is equal to the square of the number of members. In other words, if a network of 10 members is "worth" 100, a network of 1,000 members in comparison would be assigned a value of 1,000,000. This is one of the reasons that social media and social networking is so potentially powerful, it leverages the value of large networks.

In our survey, we wanted to understand what is the potential size of association member's network. We asked respondents to declare the number of contacts they have in their email contact list and on three of the most popular social networking platforms: Facebook, LinkedIn and Twitter.

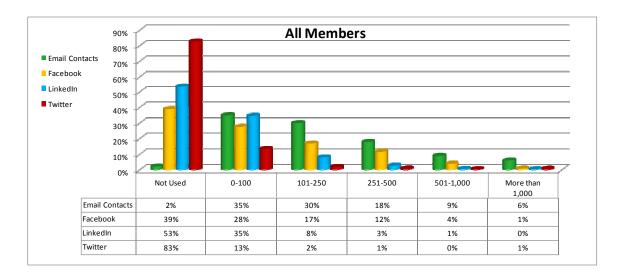
Ave. No. of Contacts per member | All Respondents

On average, an association member has just over 250 contacts in his/her email database, 119 Facebook Friends, 47 LinkedIn Contacts and 23 Twitter followers. (Note: There is likely some overlap with the same person represented more than once in two or more platforms.)

> **Your member's network of friends and professional colleagues is one of the most valuable and perhaps largely untapped resources available to help promote and communicate the value of your organization.**
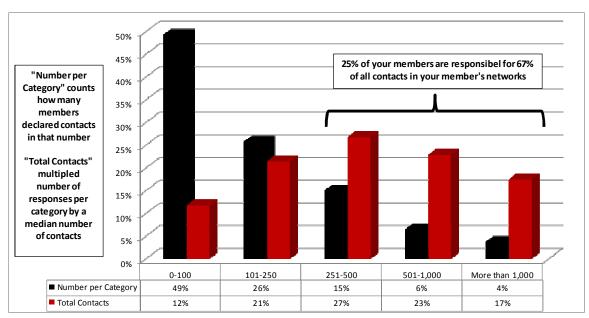
To put some of these numbers in better perspective we need to make allowance for the distribution of how many contacts each person has and for the small number of members that have exceptionally large networks. The graph below depicts the number of responses per range of contacts for each platform (Email, Facebook, LinkedIn and Twitter). For example, only 2% of respondents do not use email, 35% of respondents have from 0-100 email contacts, etc.

All Members

	Not Used	0-100	101-250	251-500	501-1,000	More than 1,000
Email Contacts	2%	35%	30%	18%	9%	6%
Facebook	39%	28%	17%	12%	4%	1%
LinkedIn	53%	35%	8%	3%	1%	0%
Twitter	83%	13%	2%	1%	0%	1%

When we evaluate the total aggregated contacts per declared group, we see that a small percentage of the total membership is responsible for the majority of all network contacts.

"Number per Category" counts how many members declared contacts in that number

"Total Contacts" multipled number of responses per category by a median number of contacts

25% of your members are responsibel for 67% of all contacts in your member's networks

	0-100	101-250	251-500	501-1,000	More than 1,000
Number per Category	49%	26%	15%	6%	4%
Total Contacts	12%	21%	27%	23%	17%

Just **4%** of members have more than 1,000 connections but these connections represent **17%** of the total membership's social network. **(Focus extra attention on "super-connected" members!)**
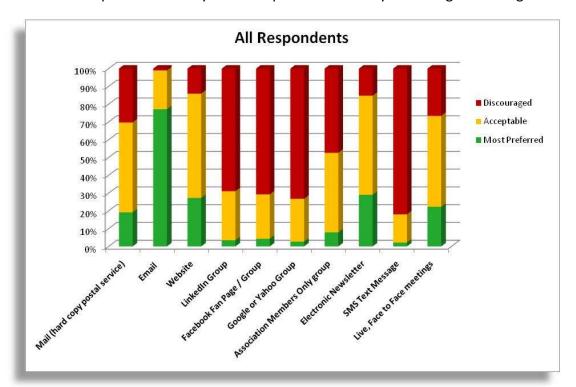
How do members prefer to receive information from the association?

Social Media is first and foremost a communications tool. Associations are also certainly in the "communications business", especially when it comes to communicating with their members.

We wanted to know, in today's social media environment, how do association members **prefer** to be communicated with. We also want to know which communication channels they actively discourage. In November 2010, Facebook CEO Mark Zuckerberg famously stated that "traditional email is dead" and outdated in the new social media environment. However, when we look at what association members say, email is by far the most prefer mode of receiving official communication from their association: 84% stated it is the most preferred method, 25% rated email as "acceptable" and only 1% of respondents actively discourage receiving emails.

The next most preferred channels for association communications are the Website, Electronic Newsletters, Face to Face meetings and Hard Copy Post. The least preferred and most discouraged channels for association communications are SMS Text Messaging, Google or Yahoo Groups, Facebook & LinkedIn Groups, and the Association Members Only group.

This highlights the need to include all communication channels in your social media and communications strategies and keep email as a core channel.
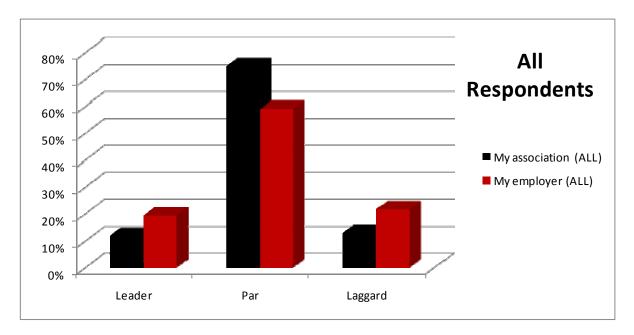
Perceived level of social media use by the member's association and employer.

Respondents were asked to rate their perceptions of how their employer and how their association are making use of technology. We assume that if a member works in an environment with a high degree of technology use, he or she will have a higher expectation of the association to provide similar tools and functionality.

This "technology gap" is important for associations to be aware of. If your members feel that the association lags in the use of technology to deliver services, they are more likely to look for alternative sources and solutions.

In the results displayed above, we see that there is a much wider variation in the performance of member's employers than of the associations (there are higher numbers reporting the member's employer as being a "Leader" and a "Laggard" than for associations in general).

If your members rank your association more often as a "Laggard" than a "Leader", you will want to review how you are using technology to improve the perception of your members towards the association as taking a leadership position.

> **Your member's develop an expectation of technology use by the association based on their environment, especially their work environment.**
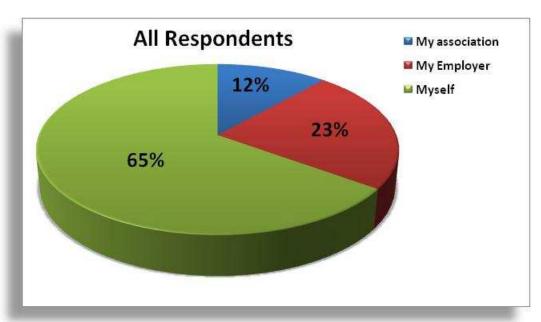
Who do you feel is responsible for your training on social media use?

Because social media is now widely used by associations and employers, we wanted to understand if the members expect the association or their employer to take the lead in helping them to understand how to use these new tools.

65% of respondents indicated that they feel personally responsible for their own education and training on social media. A significant minority of 23% expect their employer to educate and train them followed by a further 12% that expect the association to provide social media training.

Associations have the opportunity to take the lead and to help their members understand social media tools. Many associations will want to develop "private social networks" or member only forums. Members will need training and information if they are to make full use of them.

Is the technology you are using really user friendly? Make sure that any applications you use, especially private social networks or member only forums are easy to use and access. Wherever possible, eliminate steps for members to send and receive communications.
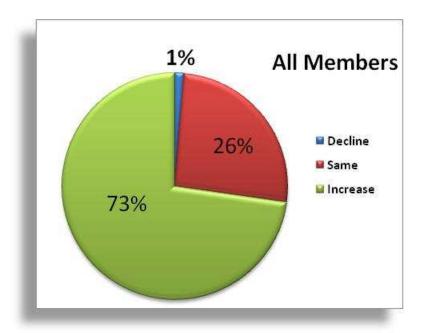
How will your use of technology change in the next 3 years?

Association members were asked to forecast their future use of technology over the next 3 years. Only 1% responded that their use of technology was expected to decline over that period and of those, 42% were 65 years or older.

Nearly 3/4's of all members expect their use of technology to increase in the near term.

As technology rapidly evolves, social media will play a key role in connecting people and the sharing of information. The pace of change is so rapid now that it is a challenge even for people that are highly engaged in technology to stay abreast of new developments.

Summary

Understanding how the members of your association are using social media, especially for career related activities like networking, information sharing and professional development, is critical in order to craft a successful social media strategy and plan.

What we have learned so far from this study is:

1. Association members, of all age groups, are using social media to a high degree to meet a portion of their professional networking, information sharing and professional development needs today.

2. Although age plays a large factor in the percentage of individuals that are using social media, all members are focused on very similar benefits: networking, news & information, information sharing and research.

3. Social media is an important element of an overall communications mix but is not yet in a position to replace traditional communications channels.

4. Email remains a prime communication tool and should be used in tandem with your social media campaigns.

5. Search Engine Optimization (SEO) is another critical element that should be reflected in your overall communications planning and activities.

6. Many organizations are missing critical social media use policies and implementation strategies. At best, they are not leveraging the potential power of social media, at worst, they are exposed to social media related risks and inappropriate use by their members.

When we work with clients, the first question we ask is "What do you want to achieve?"

The very next question is "Who is your audience and what are their objectives?"

This study is an attempt to better understand how individual members are using social media so that associations can craft smarter business plans.

If you would to participate in this study and benefit from a better understanding of how your members are using social media today, please visit: **www.socialstrat.org/surveys/**

You can read a full description of how to participate and answers to common questions about how member data is treated.

About SOCIALSTRAT

SOCIAL**STRAT** has developed a leadership position in the strategic application of social media. We are focused on understanding the "why" of using social media before our clients invest scarce time and resources that do not have a clear objective.

Having conducted original research on more than 900 organizations, and now more than 8,000 individual association members, we have a solid understanding of how associations and their members are using social media. We use this data to provide veracity and substance to our consulting services as we help organizations develop social media business plans.

We are also leaders in understanding the legal risks related to the use of social media having founded **SOCIALEX – The Social Media Legal Community**. This online community includes legal professionals from YouTube, LinkedIn, Newsweek, AOL, Yahoo!, Mozilla, Proctor & Gamble, Verizon, Target, Dell, McDonalds, Genzyme, Boeing, Accenture, and General Electric, as well as leading independent law firms, legal Associations, law schools and association general counsel. More than 650 attorneys have joined to date.

We have also established the **LinkedIn Users Group** for association and company professionals that want to understand how to get more out of their LinkedIn (and FaceBook) groups. More than 600 individuals take advantage of this peer group setting.

At a time when many groups are experimenting with social media, we help them to focus on developing a true business case and plan to using social media to grow their organizations.

Contact us today to see how we can help you!

Terrance Barkan CAE, Chief Strategist

SOCIAL**STRAT**

www.socialstrat.org | | |Direct: +1 202 294 5563