



# GATHER

WE'RE GOING TO LET  
THIS RUN, BUT WE'RE NOT  
SURE HOW TO KEEP IT  
FROM RUNNING AWAY

HOW CORPORATES FEEL ABOUT  
DIGITAL AND SOCIAL MEDIA

November 2014

## METHODOLOGY

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 712 B2B decision makers (excluding sole traders). Fieldwork was undertaken between 18th and 22nd August 2014. The survey was carried out online.

The quantitative research was conducted through YouGov's Business Omnibus with a sample comprising 712 business decision-makers, excluding sole traders, of whom 433 had direct responsibility for communication with customers; employees; influencers; or investors. The sample covered the key sectors of manufacturing, construction, financial/accounting, retail, IT/telcos, marketing, legal, medical and education.

The qualitative research conducted by Gather consisted of 12 in-depth interviews with businesses with first-hand knowledge of working with Gather, either as clients or partners. Each interview focused on Gather's relationship with the business, the current and future communications challenges of the business, and the future role of external agencies in addressing these challenges.

For the purposes of the survey, digital media was defined as follows:

For the following question, by "digital media channels", we mean any digital channel or tool used for communication purposes (e.g. websites, intranets and extranets, but excluding telephony).

By "social media", we mean online interaction platforms such as Facebook, Twitter, LinkedIn, etc.

Finally, the audience type called 'Influencers' (see page 2) refers to journalists, commentators, industry experts, etc.

## INTRODUCTION

The era of 'my media' or 'screens-everywhere' has created an insatiable appetite for round-the-clock, high-speed information in and out of organisations.

This constant scrutiny and the feeling that there is nowhere to hide is placing extraordinary demands on their communications departments. The power has shifted. Technology is giving stakeholders multiple ways to communicate with brands, businesses and each other, and organisations are struggling to manage and maintain the conversation in balance.

There is a wealth of information available about use of technology by consumers and other stakeholders. The missing piece in the jigsaw has been organisations' understanding of how each of their audiences uses multichannel media. Also absent has been a frank self-assessment of marketing and communications professionals' levels of expertise in this new media landscape. Without this insight, corporations can't hope to organise the communications agenda, weakening the impact of their messages.

This Report draws on the findings of a survey conducted by YouGov on behalf of London-based strategic communications consultancy Gather, alongside in-depth interviews with Gather's clients and partners.

The Report seeks to suggest ways that businesses can unpick the complexity of modern communications to create simple yet effective frameworks, allowing them to talk to different audiences, with appropriate messages, in the right tones, based on the same core values.

The research was designed to provide an understanding of the current and future environment through the eyes of those with responsibility for business communications to investors, customers, employees and influencers.

The Report gives an insight into how firms feel about their own use of digital and social media, and how well they understand their stakeholders' behaviour in these channels.

Ultimately, it identifies the need for businesses to take a deep breath before they communicate, to act on insights into their audiences' and their own behaviour, and to work with ideas that, from the start, define and enable joined-up communications.

## EXECUTIVE SUMMARY

In scrutinising their own methods of communication, many businesses admit they are not as up to speed with digital and social media as they should be. Corporate managers lack confidence: they are unclear about their audiences' precise behaviour in social and digital channels and feel (perhaps as a consequence) they lack understanding of how to use social and digital media effectively themselves.

Businesses want or are willing to get involved and many intend to increase social and digital media use, but many are not well prepared for the gear change and feel things will only get trickier as they plough in more resource.

There is a perceived lack of quality and care in the production and distribution of content and messaging, leading communications to lack freshness, credibility and alignment to business strategy. Communications managers are naturally inclined to manage communications and feel they could do better.

# RESEARCH FINDINGS

# 30%

**of organisations with a responsibility for communicating with investors admitted that they didn't currently use any of the main digital and social channels.**

One theme stood out in the responses: organisations are unclear about the role of digital and social media.

In powerful combination, the survey and interviews highlighted a large degree of uncertainty – if not confusion – about how businesses and audiences use digital and social media. (See Fig. 1)

Many organisations don't even employ these channels: 8% currently utilise neither social media nor digital channels, and currently have no plans to use them. Some 30% of those with a responsibility for communicating with investors admitted that they didn't currently use any of the main digital and social channels, while 30% of those responsible for communicating with employees said the same.

This does not mean that they don't have a digital presence, but rather that they are not using them to have a direct, engaging conversation. Overall, these were the audiences least likely to be contacted via the digital and social channels from the given list. In fact the in-depth discussions suggested that “employees are all too often taken for granted”.

Customers were slightly more likely to hear from the businesses surveyed via one of these digital and social channels,

with 24% of those with responsibility for contacting customers selecting “none of these”, while 19% of respondents with responsibility for contacting influencers had said the same.

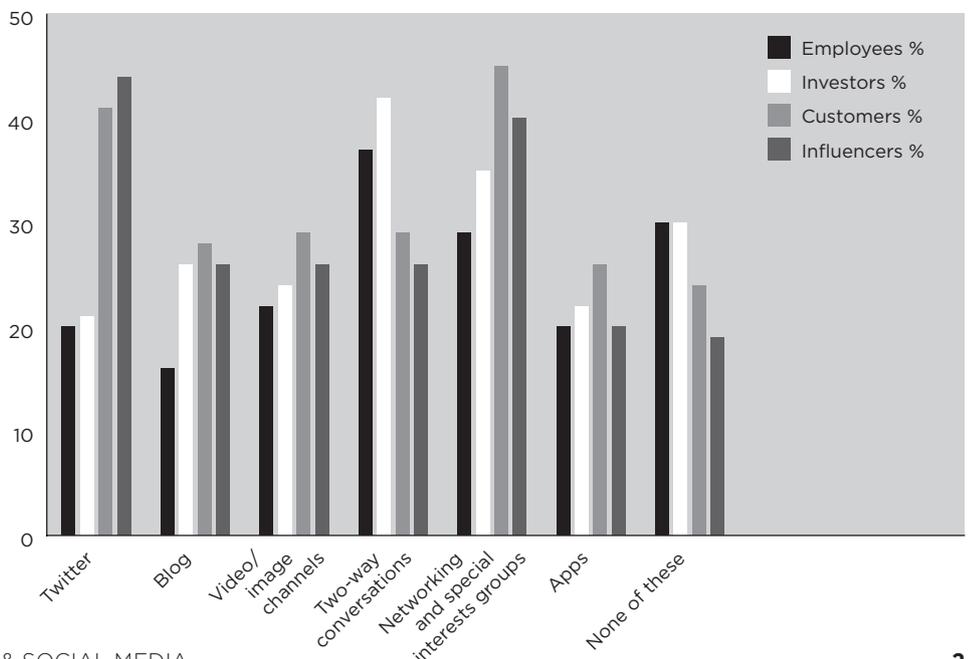
Furthermore, there appears to be a muddled contact strategy across businesses that use these channels. Among those with a responsibility for contacting customers, a high level said that they use networking/special interest groups (45%) and Twitter activity (41%), while those responsible for reaching out to influencers such as journalists, commentators, industry experts, etc. also used networking/special interest groups (40%) and Twitter activity (44%).

Some 42% of respondents communicating with employees were engaging with them via two-way conversations, with networking and special interest groups (35%) the next most frequently used channel for this group. Investors were also most commonly spoken to using the same methods, with 37% creating two-way conversations and 29% networking/establishing special interest communities.

Of the other channels, Apps were the lowest priority – an average of 22% usage across the four audiences – while blogs were overlooked by many decision makers.

**“There is always a challenge for a company with different audiences operating at different speeds.”**

**FIGURE 1: In which, if any, of the following ways does your business communicate with each of the following groups of people in your business?**



The in-depth discussions threw into sharp relief the range of channel strategies being pursued. One employee engagement consultant said modern media offered “a very wide range of channels... and very variable quality”. There was also this frank admission from a brand manager: “We are in the dark ages, 90% of communications across the business are paper based.”

The range of audiences to reach, multiplied by the wide selection of channels at corporations’ fingertips, is a problem in itself. Another of the interviewees stated, “There is always a challenge for a company with different audiences operating at different speeds.”

### THE RUSH TO DIGITAL

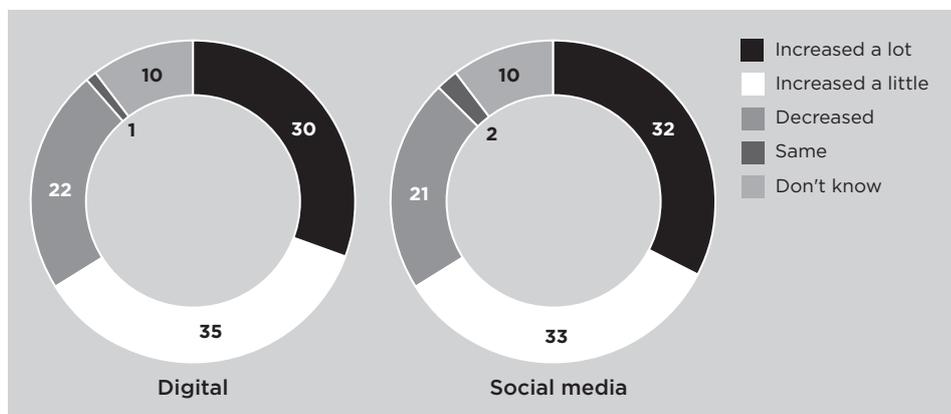
If marketing and communications specialists think their task is perplexing today, their willingness to harness more channels in the future will only make it more complex. (See Fig. 2)

Some 65% expect to increase their use of digital media in the next two years, and the prediction is the same for social media. Only a limited number think it “just doesn’t feel like their world”, as one interviewee put it. Another thought, “There is immense pressure... to communicate; social media has made this instantly achievable.”

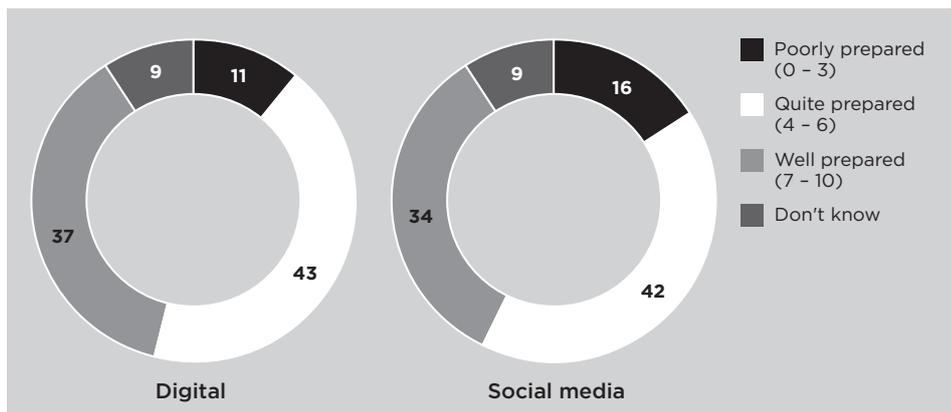
On the one hand it’s positive that so many businesses intend to adopt the communication channels of the 21st Century. On the other hand, the results are more concerning when viewed alongside organisations’ self-assessment of their ability to cope with a surge in activity. (See Fig. 3)

Only 55% of businesses believed they will have increased the amount their business uses digital and social communication in two years’ time. Anxiety was most keenly felt about social media, with 16% claiming they were poorly prepared, based on a scale of 0-10<sup>2</sup>, compared to 11% for digital. Around half in each category – 54% for digital and 50% for social – said their business was well prepared.

**FIGURE 2: Do you think your business’s use of each of the following for business communications will have increased, remained the same or decreased in two years’ time (i.e. 2016) compared to now?**



**FIGURE 3: In general, how prepared, if at all, do you think that your business is to increase its use of digital/social media for your business communications?**



**65%**

**Some 65% expect to increase their use of digital media in the next two years, and the prediction is the same for social media.**

**“There is immense pressure to communicate; social media has made this instantly achievable.”**

<sup>2</sup> In this case 0 refers to “Not prepared at all” and 10 refers to “Extremely well prepared”. The percentages quoted refer to a 0 - 3 cluster and a 7 - 10 cluster.

**“Pushing the send button is very easy, but the danger (of doing so) is very big.”**

**KNOWN UNKNOWNNS**

The situation is exacerbated by another key finding apparent in the survey responses and amplified by the interviews. (See Fig. 4 and Fig. 5)

Businesses claimed a ‘mid-level understanding’ of their stakeholders’ social and digital media consumption. Levels are higher for digital with 38% saying they were experienced and sophisticated users, compared to 27% claiming the same amount of social media expertise. However, 25% said they were either getting to grips with, or real beginners in digital channels, and 37% said the same about social media. It seems there is an urgency to join the conversation but an uncertainty about what to say or how and where to say it – or how to respond.

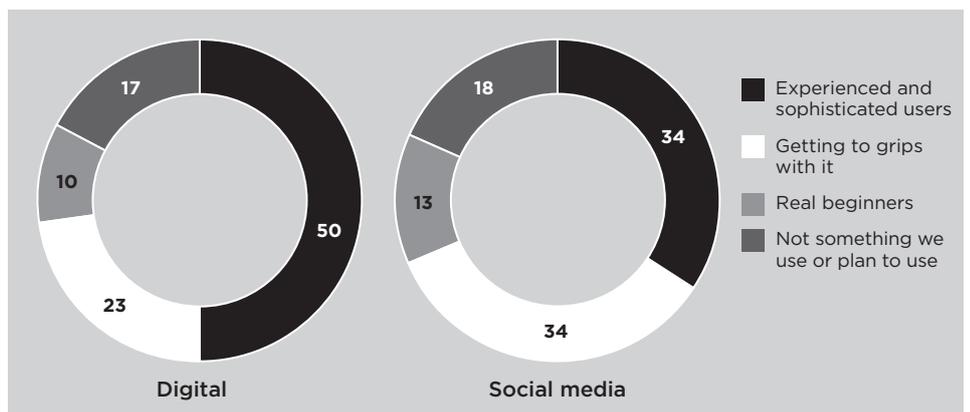
In terms of how well respondents felt they personally understood the use of social and digital media by each of their four stakeholder audiences, customers seem to be causing the biggest headaches<sup>3</sup>. The study found 16% of respondents responsible for communicating with customers reported ‘very limited’ knowledge of customers’ use of social media, in comparison to 15% selected for digital channels.

Respondents with a responsibility for communicating with employees reckoned they possessed a better understanding of their use of social media (61%) and digital media (63%) in the survey.

This was a view not necessarily mirrored in the in-depth interviews, however. One employee engagement consultant made the point that everyone is doing social media but struggling to engage with more than 5% of their employees – no more representative than “conversations at the water cooler”, in her view. She warned that abuse of social media could lead to communications getting lost – with the perils of failing to communicate well with employees ranging from disengagement and high turnover (‘brain drain’) to financial consequences: the less people understand why they come to work and how much they are valued and needed, the less they are motivated and the lower their productivity will be. All have reputational consequences.

While the results from the questionnaire point to what the business community might self-certify a ‘satisfactory’ comprehension of new media channels, the interview participants weren’t so sure. Many highlighted a working knowledge, at best. “Our understanding [of customer use of social media] is woeful,” declared one brand manager. Another neatly

**FIGURE 4: Which ONE, if any, of the following BEST describes when thinking about using each of the following for business communications (e.g. to the business’ investors, employees, customers or influencers)?**



<sup>3</sup> In this question respondents were presented with a scale where 0 referred to “I don’t understand” and 10 referred to “I completely understand”. The percentages quoted refer to a 0 – 3 cluster and a 7 – 10 cluster.

summed up the problem of communicating with digital natives on their own territory: “Gen Y/Millennials... display ambivalent behaviours which are often poorly understood by senior executives.” There were also strong opinions on the importance of thinking social media through before leaping headlong into it. Another internal communications consultant believed “the world is charging into soundbites” without giving them due care or attention; and that “pushing the send button is very easy, but the danger [of doing so] is very big”. And a further respondent said there was “...a wide range of social media literacy; everyone wants to be better, but few understand”.

### QUALITY OVER QUANTITY

Within the interview responses there was a feeling that the quality and content of messaging must be spot on to create cut-through in a cluttered world. Yet there is a feeling that organisations are moving straight to execution without developing a clear strategy for doing so: the channel is leading decisions, rather than the needs of the business or the audience.

Social media must be an enabler, not a driver. During an in-depth interview one participant said: “[We need to] challenge the fallacy that there is a need to broadcast like mad, not create more noise, but be very selective about what audiences want to hear.”

Another spoke of “almost too many opportunities. Many companies don’t know where to look and are spreading themselves too thinly”.

There is also a sense that those embracing social and digital media run the risk of short-termism, ignoring longer-term thinking. This could be because firms are so focused on the next set of financial results and do not find it easy to project strategies into the future.

The wiser communications director, however, will recognise that social media is not a quick fix or just a channel through which to run stream of consciousness ideas or responses to audience comment. An interviewee said: “There is a real need to avoid ambiguity and leaving content open to interpretation or elaboration. Accessibility, speed and immediacy can drive a lack of care and attention and these ‘old world’ skills need to be transferred.” Face-to-face communications, it seems, will continue to be crucial in this brave new world as brands seek to deliver integrated engagement to all of their audiences.

**“Accessibility, speed and immediacy can drive a lack of care and attention, and... ‘old world’ skills need to be transferred.”**

<sup>3</sup> In this question respondents were presented with a scale where 0 referred to “I don’t understand” and 10 referred to “I completely understand”. The percentages quoted refer to a 0 – 3 cluster and a 7 – 10 cluster.

**FIGURE 5: In general, how well, if at all, would you say you ‘personally’ understand how each of the following groups use digital channels (e.g. websites, intranets and extranets, but excluding telephony) for business communication?<sup>3</sup>**

	Investors		Employees		Customers		Influencers	
	Digital %	Social media %	Digital %	Social media %	Digital %	Social media %	Digital %	Social media %
Very limited (0 - 3)	6	17	12	12	15	16	9	9
Mid-level understanding (4 - 6)	41	28	26	27	35	37	30	28
High-level understanding (7 - 10)	53	56	63	61	50	47	61	63

The things that most concern organisations when using these channels:

41%

broadcasting freshness of ideas

35%

credibility

33%

alignment

### FUTURE SHOCKS

The huge range of knowledge and competency around digital and social media, coupled with its ever escalating use, is riddled with multiple pitfalls, according to the survey. (See Fig. 6)

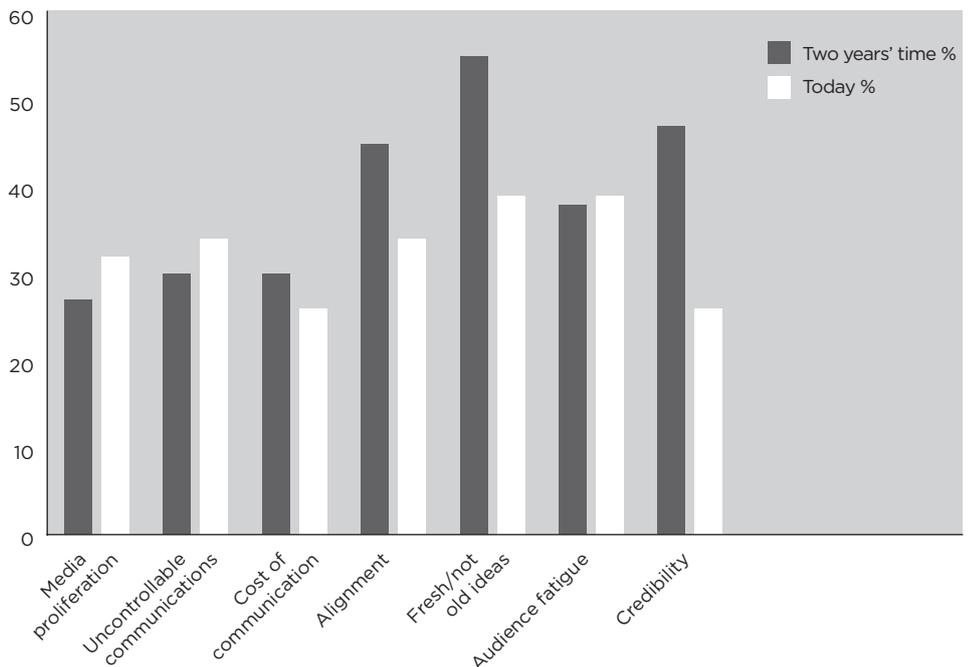
Today, organisations most commonly list broadcasting freshness of ideas (cited by 41% of respondents), credibility (35%) and alignment (33%) as the things that are current communication challenges for their business.

Meanwhile, making sure the communications are fresh/not old news (29%) and audience fatigue (29%) were regarded as the “future shocks” of harnessing digital and social when respondents were asked about prospective problems of communicating in two years’ time. This anxiety runs parallel with the earlier statistic that businesses’ use of these media will only grow. In other words: “We’re going to let this run, but we’re not sure how to keep it from running away”.

Businesses are clearly aware of the opportunities for communication that digital and social media afford them. But they also know they need a better grasp of how to control these touchpoints and an understanding of their stakeholders’ channel behaviour. Fail, and the messages they send out will be weak, disparate and disregarded – potentially leaving their reputation in tatters.

Businesses recognise that the world is changing all around them. They also understand the need to embrace the opportunities afforded by new audience communication channels. To use these successfully, they must overcome obstacles that form some of the biggest corporate challenges of the 21st Century.

**FIGURE 6: Which, if any, of the following do you think are/will be communication challenges to your business in each of the following time periods?**



## THE NEED FOR STRATEGY

The survey findings point to a tendency among corporates to leap straight to communication execution without having a clear strategy in place. One of the interviewees said of the rush to execution: “Planning is important. Take a moment to think ‘hang on, what is happening out there and how will [audiences] feel when this lands?’”

Organisations have an instinctive desire to better understand themselves and their wider communities, but it’s a confusing landscape. Many business leaders find it difficult to think ahead because they are often conservative by nature. They are hampered by investors’ desire for short-term gain and focus on the next quarter or six months rather than what their stakeholders will desire two, five or 10 years down the line. They need a starting place, tools and techniques, and a roadmap to get to grips with their options for communication.

Some see the opportunity for regaining control in the setting and managing of the organisation’s ethos and vision. Control at this strategic level sets out the business’s direction of travel, for the long term. It also sets a framework for communication to all stakeholders and across all channels – including digital and social media.

**“Planning is important. Take a moment to think ‘hang on, what is happening out there and how will (audiences) feel when this lands?’”**

# SUMMARY AND RECOMMENDATIONS

1. **Brands are built by the conversations people are having online.** Focus first, before doing anything else, on a central idea that allows a wide variety of expressions, all of which are relevant and personal to specific parts of your audience spectrum but obviously have origins in the same place. As one of the interviewees put it: “[We don’t] want to follow the crowd into aggressive use of social media and digital... We need a consistent presence that is on brand and distinctive, rather than being clever for its own sake.”
2. **Place the stakeholder, not the channel, at the centre of everything.** Businesses have become obsessed with channel, but it’s a blurred lens; not part of a wider experience the individual has with the organisation.
3. **Find the motivating truth at the heart of the organisation.** What are the key tenets of the business that can touch all parts of its internal function and external messaging? Digging this out is the crux of the single organising idea.
4. **Seamlessly integrate channel with content.** Use a deep understanding of your audiences’ technological literacy to build a connected approach around behaviours, leading to effective content development. Does the business need to conduct research to better understand how its audiences use social and digital media?
5. **Strong, clear writing makes a difference.** “(It) makes a great message and gives it tentacles” according to an interviewee working in the drinks sector. Don’t underestimate the power of good writing and pace and tone to create a consistent house style that underpins the overall communications strategy.
6. **Don’t just react.** Once a message is uploaded to social media, the business is no longer in control of what happens next. They must resist the temptation to test and learn on an ad hoc basis, and instead give careful consideration to what needs to be said.
7. **Focus your efforts.** The more messages the business broadcasts in an unfocused way, the less control it will have. Ultimately, the risk is one of message dissipation; the tone won’t be received as intended, or the message will be overlooked completely – the equivalent of shouting into the void.
8. **It’s good to stay silent.** As the survey proved, most businesses see social and digital media as an opportunity. But it’s also important to occasionally turn your back on the chance to say something. Multiple messages could easily fall foul of ‘decluttering’, a very modern consumer concept. There’s really no harm in staying shy and silent sometimes, as what you do say is more likely to make people notice and respect your point of view.
9. **There are no silos.** The ability to communicate discretely with one particular audience no longer exists. Anyone can find every piece of information they are after so the need to have a structured communications plan is paramount.
10. **Some of the old rules still apply.** Although they are currently the channels keeping marketers and communications professionals awake at night, digital and social media are not the be-all and end-all. Decades of expertise have been built around more traditional means of communication, so knowledge transfer and a commitment to retaining face-to-face channels are crucial.

## OUR VIEW

### **Ideas people gather around**

Organisations need ideas. Ideas that resonate in the imaginations of the people that matter to them. In our connected world, that often means everybody.

Brands are built by many things, but increasingly by the conversations people are having about them – online and off. Successful organisations are those whose ideas inhabit these conversations because they are believed.

We create ideas that people gather around. The ideas that get people talking so that they are more valuable to your business and your reputation.

We do this by digging for insights and driving them through multiple channels. We focus on stakeholder attitudes and behaviours using our skills in brand, digital, sustainability, reporting and video to achieve practical and measurable results.

Our ideas help organisations perform better. We help them to be clear about their purpose and values and find ways to support these through the things they say and do.

## ABOUT GATHER

We are a strategic communications consultancy.

We join up insight and creativity to develop ideas people gather around, helping organisations build relationships and grow reputation.



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