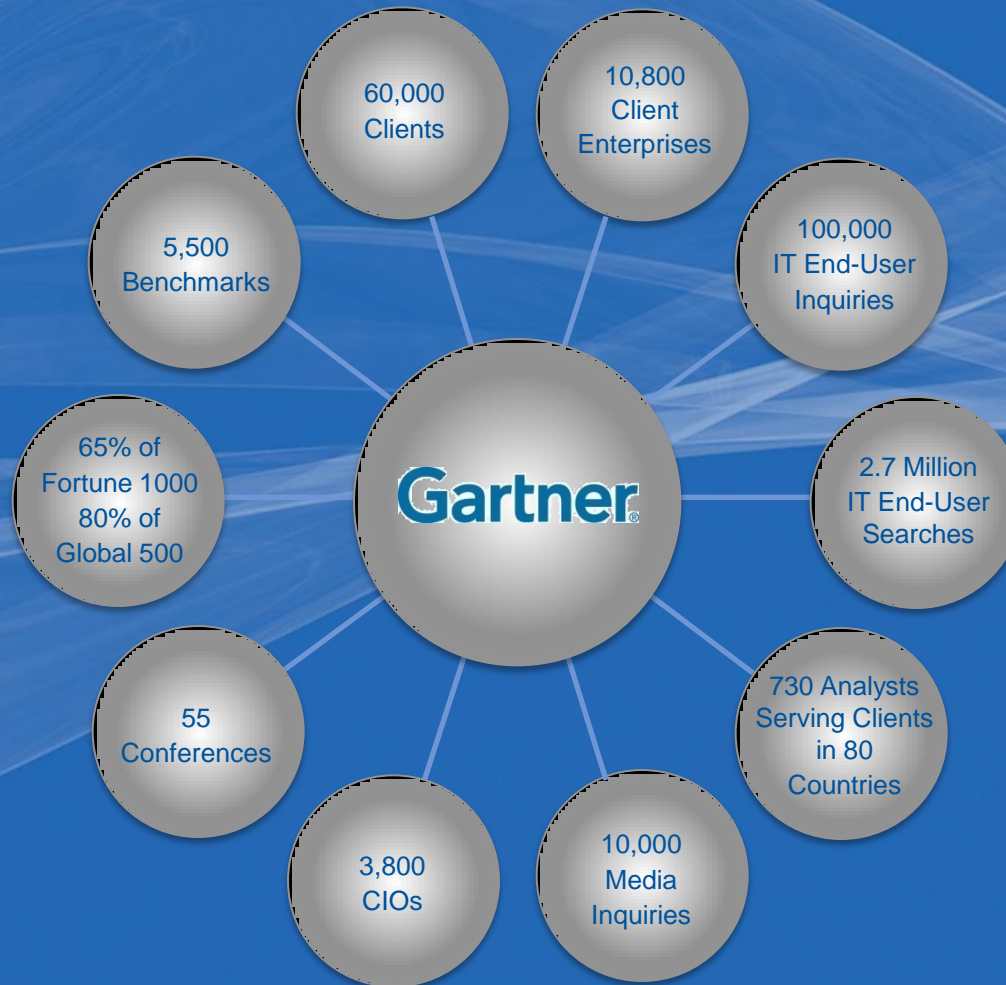


Welcome!

Thank you for joining us on today's Gartner webinar.

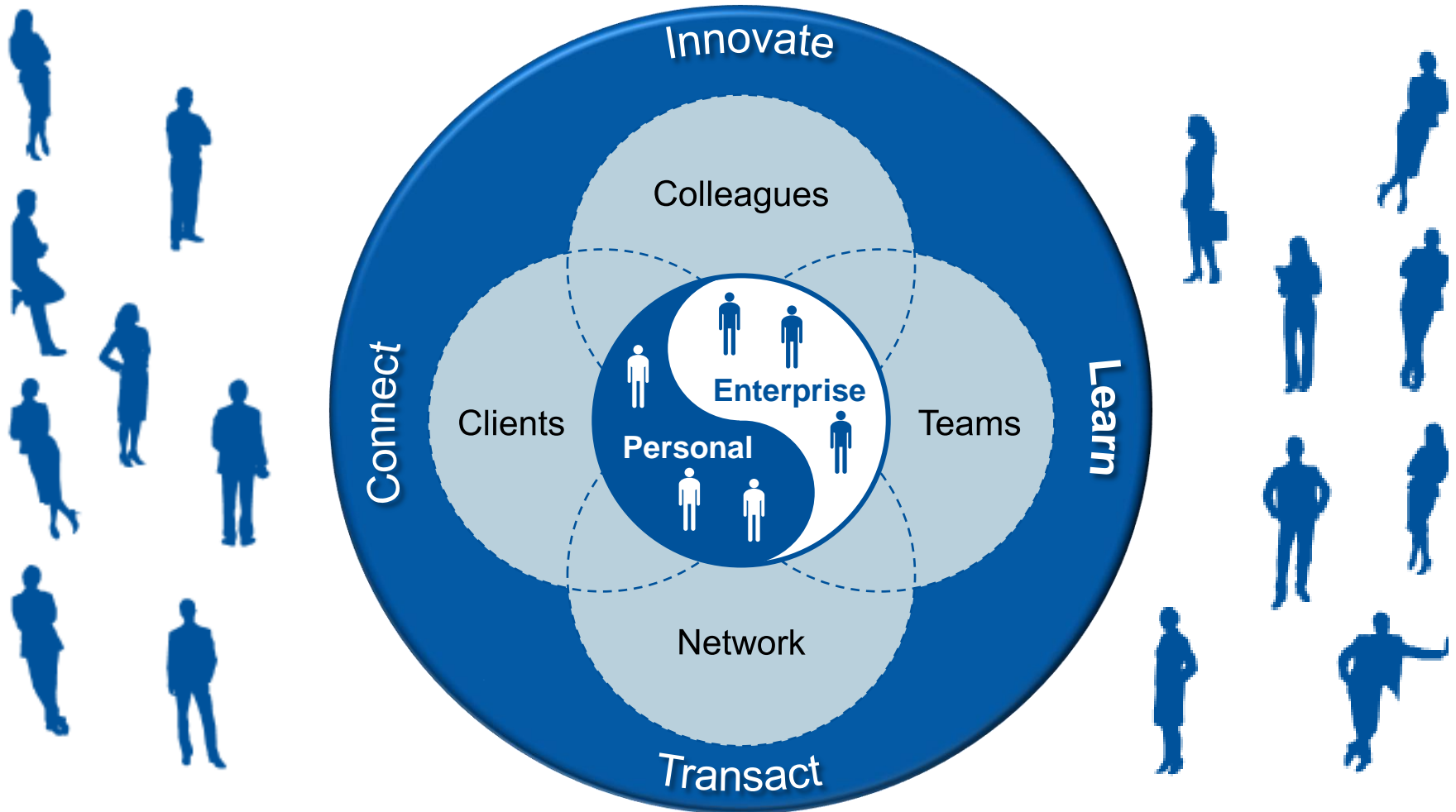


Gartner Webinar: Business Gets Social: Social Media Tools and Sites, Buyers and Budgets

Venecia K. Liu, Research Director
Jeff Roster, Research VP

March 29, 2011

Business Gets Social

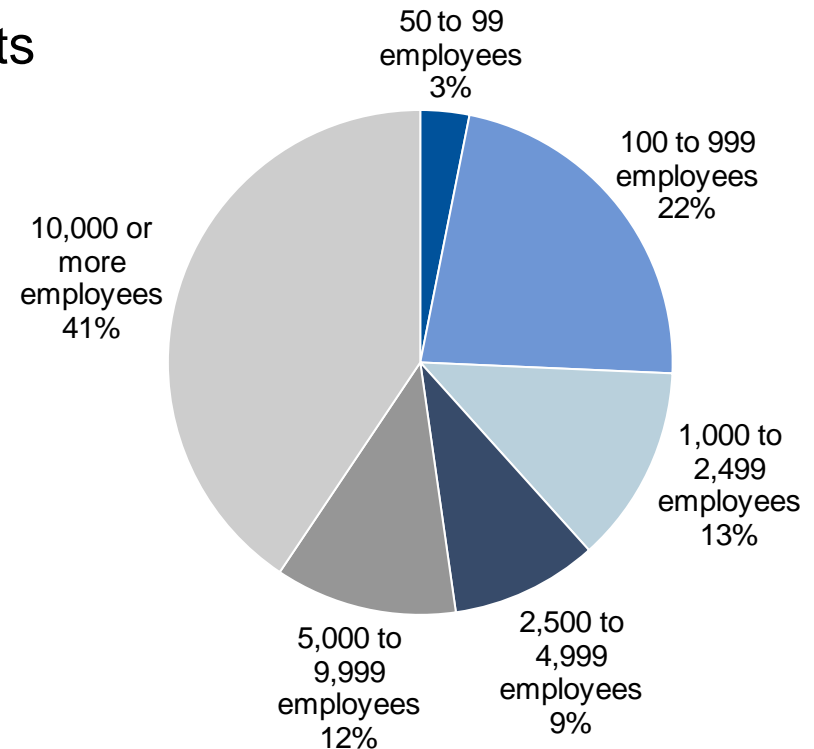


Key Issues

- What are the industry adoption patterns and challenges for social media?
- Which social media tools and social networking sites are hot, and which are not?
- How much are companies spending on social media and who owns the budget?

Gartner 2011 Social Media Survey

- Online survey conducted from Dec. 2010 to Jan. 2011
- About 50% of 4,321 survey participants have a social media presence
- 798 qualified respondents were active in social media and were personally knowledgeable about or responsible for planning, evaluation or selection of social media & collaboration within their organizations.
- Roughly half of the respondents were from U.S. vs. U.K. and half from IT vs. Marketing
- Companies with less than 50 employees were screened out

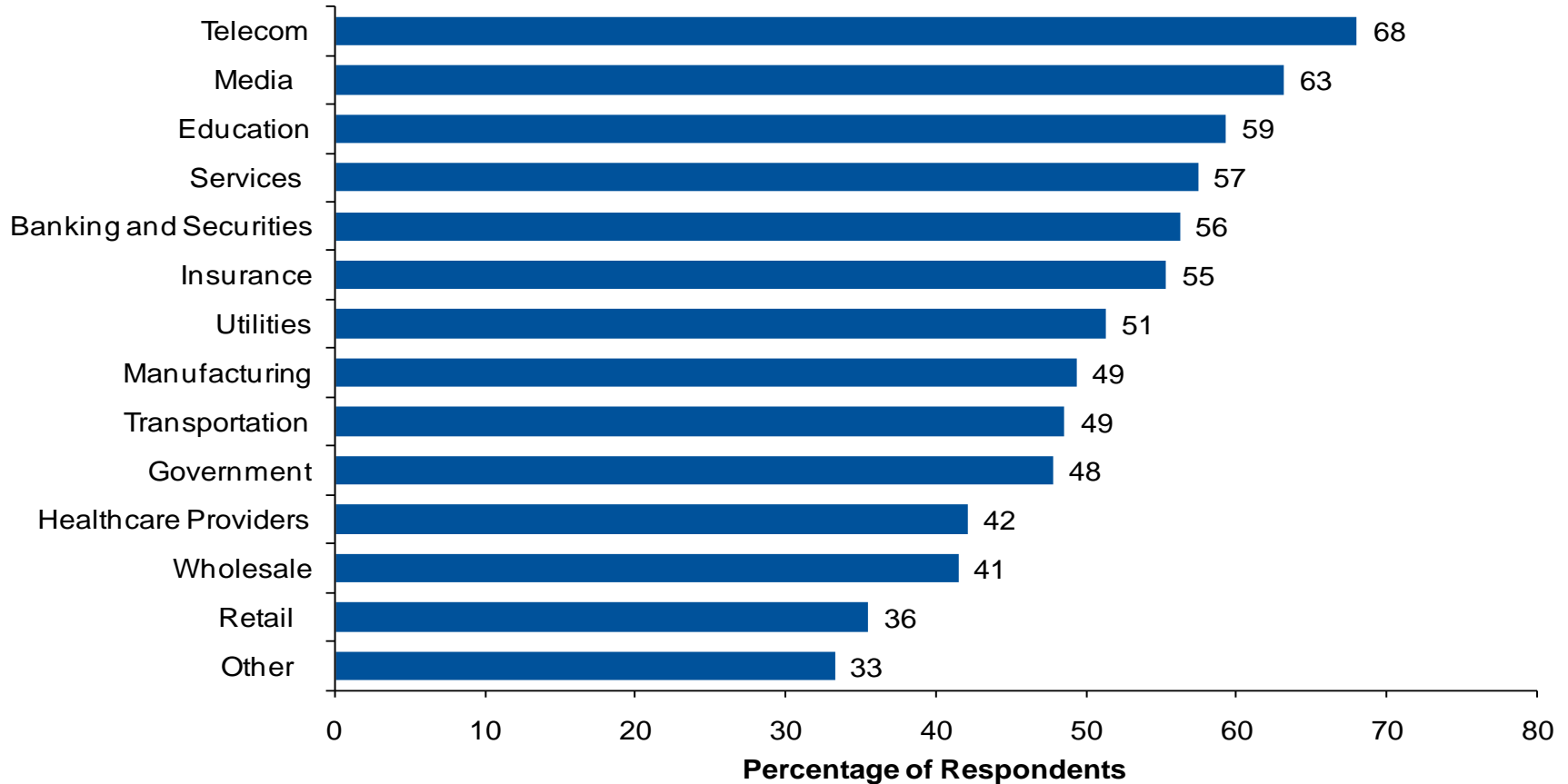


Source: Gartner Social Media Survey, March 2011

N = 798

Social Media and Collaboration Tool Adoption: Telecom Industry Leads

Screener Q. Does your organization currently use and/or participate in social media and collaboration tools such as Wikis, blogs, RSS, web chats, or podcasts for business purposes either for internal or external communication and collaboration?

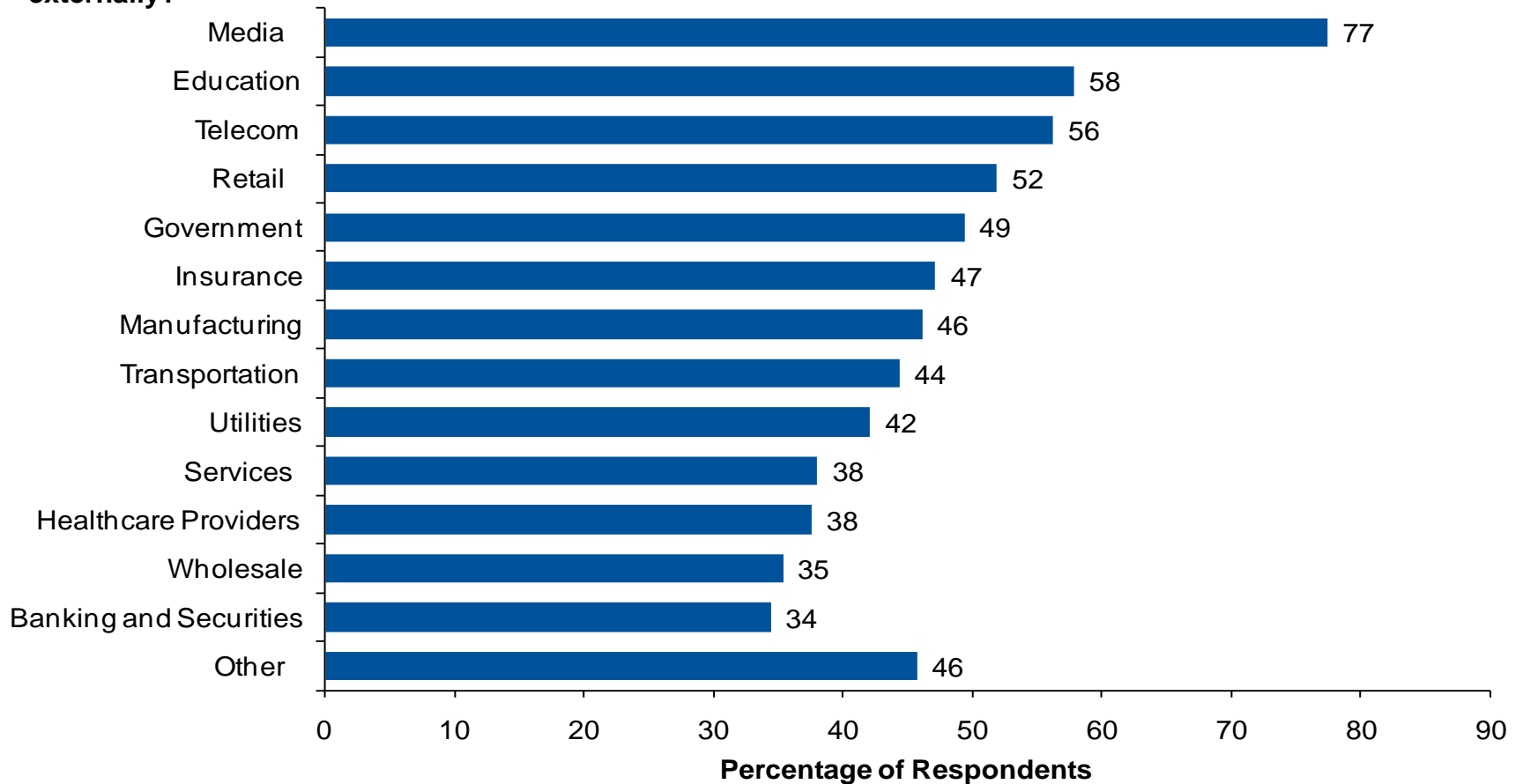


N = 4,321

Source: Gartner Social Media Survey, March 2011

Social Networking Site Usage: Lag in Banking and Securities

Screener Q: Does your organization currently use and/or participate in social networking sites such as Facebook, YouTube, Twitter, SecondLife, Foursquare or an equivalent, for use either internally or externally?



N = 4,321

Source: Gartner Social Media Survey, March 2011

Heat Map for Social Media Drivers Across Industries

	Healthcare	Transportation	Manufacturing	Banking	Retail	Wholesale	Insurance	Telecom	Media	Government
Improve Communications	Significant factor	Significant factor	Somewhat of a factor	Significant factor	Significant factor	Significant factor	Significant factor	Significant factor	Significant factor	Significant factor
Idea Creation/Creativity	Small factor	Somewhat of a factor	Significant factor	Small factor	Small factor	Significant factor	Somewhat of a factor	Small factor	Significant factor	Somewhat of a factor
Problem Solving	Somewhat of a factor	Somewhat of a factor	Small factor	Small factor	Somewhat of a factor	Small factor	Small factor	Significant factor	Small factor	Small factor
Generate Revenue	Small factor	Significant factor	Somewhat of a factor	Small factor	Small factor	Small factor	Somewhat of a factor	Somewhat of a factor	Significant factor	Small factor
Sharing/Knowledge Transfer	Somewhat of a factor	Small factor	Significant factor	Somewhat of a factor	Small factor	Somewhat of a factor	Small factor	Somewhat of a factor	Somewhat of a factor	Significant factor
Brand Enhancement	Somewhat of a factor	Significant factor	Somewhat of a factor	Significant factor	Significant factor	Significant factor	Significant factor	Significant factor	Significant factor	Small factor
Enhance Teamwork	Small factor	Somewhat of a factor	Significant factor	Somewhat of a factor	Small factor	Small factor	Small factor	Small factor	Small factor	Small factor
Retain Customer Loyalty	Small factor	Significant factor	Significant factor	Significant factor	Significant factor	Somewhat of a factor	Somewhat of a factor	Significant factor	Significant factor	Small factor
Enhance Productivity	Small factor	Somewhat of a factor	Small factor	Small factor	Small factor	Small factor	Small factor	Small factor	Somewhat of a factor	Somewhat of a factor
Decrease Marketing Costs	Small factor	Small factor	Somewhat of a factor	Small factor	Small factor	Somewhat of a factor	Somewhat of a factor	Somewhat of a factor	Somewhat of a factor	Somewhat of a factor
Lead Generation	Significant factor	Small factor	Small factor	Somewhat of a factor	Significant factor	Small factor	Small factor	Significant factor	Significant factor	Small factor
Keeping up with Peers	Significant factor	Significant factor	Small factor	Somewhat of a factor	Somewhat of a factor	Small factor	Somewhat of a factor	Somewhat of a factor	Significant factor	Small factor

■ Significant factor
 ■ Somewhat of a factor
 ■ Small factor

Heat Map on Social Media Inhibitors Across Industries

	Healthcare	Transportation	Manufacturing	Banking	Retail	Whole sale	Insurance	Telecom	Media	Government
Unclear ROI	Yellow	Yellow	Red	Yellow	Yellow	Red	Red	Red	Red	Red
Lack of Strategy	Yellow	Red	Red	Yellow	Red	Yellow	Red	Yellow	Red	Yellow
Lack of Understanding	Red	Yellow	Red	Yellow	Red	Red	Yellow	Yellow	Green	Yellow
Loss of Control	Red	Red	Red	Red	Red	Yellow	Grey	Red	Red	Red
Lack of IT skills	Green	Green	Yellow	Grey	Green	Red	Green	Green	Green	Grey
Lack of Executive Support	Yellow	Green	Yellow	Green	Green	Red	Yellow	Yellow	Grey	Yellow
Lack of Funding	Red	Yellow	Red	Grey	Green	Yellow	Yellow	Yellow	Grey	Red
Data Risk/Concern of Exposure	Red	Yellow	Red	Red	Red	Yellow	Grey	Yellow	Yellow	Red
Regulatory Hurdles	Yellow	Yellow	Yellow	Red	Grey	Green	Yellow	Green	Grey	Red
Security Concerns	Red	Red	Yellow	Yellow	Yellow	Yellow	Grey	Yellow	Yellow	Yellow
Loss of Productivity	Green	Yellow	Red	Yellow	Yellow	Green	Grey	Yellow	Green	Grey

■ Significant factor
 ■ Somewhat of a factor
 ■ Small factor

Social Media: Top Technical Challenges

- Content Management
- Monitoring
- Analytics and/or Datamining
- Integration Challenges
- Linking Social Media to Databases

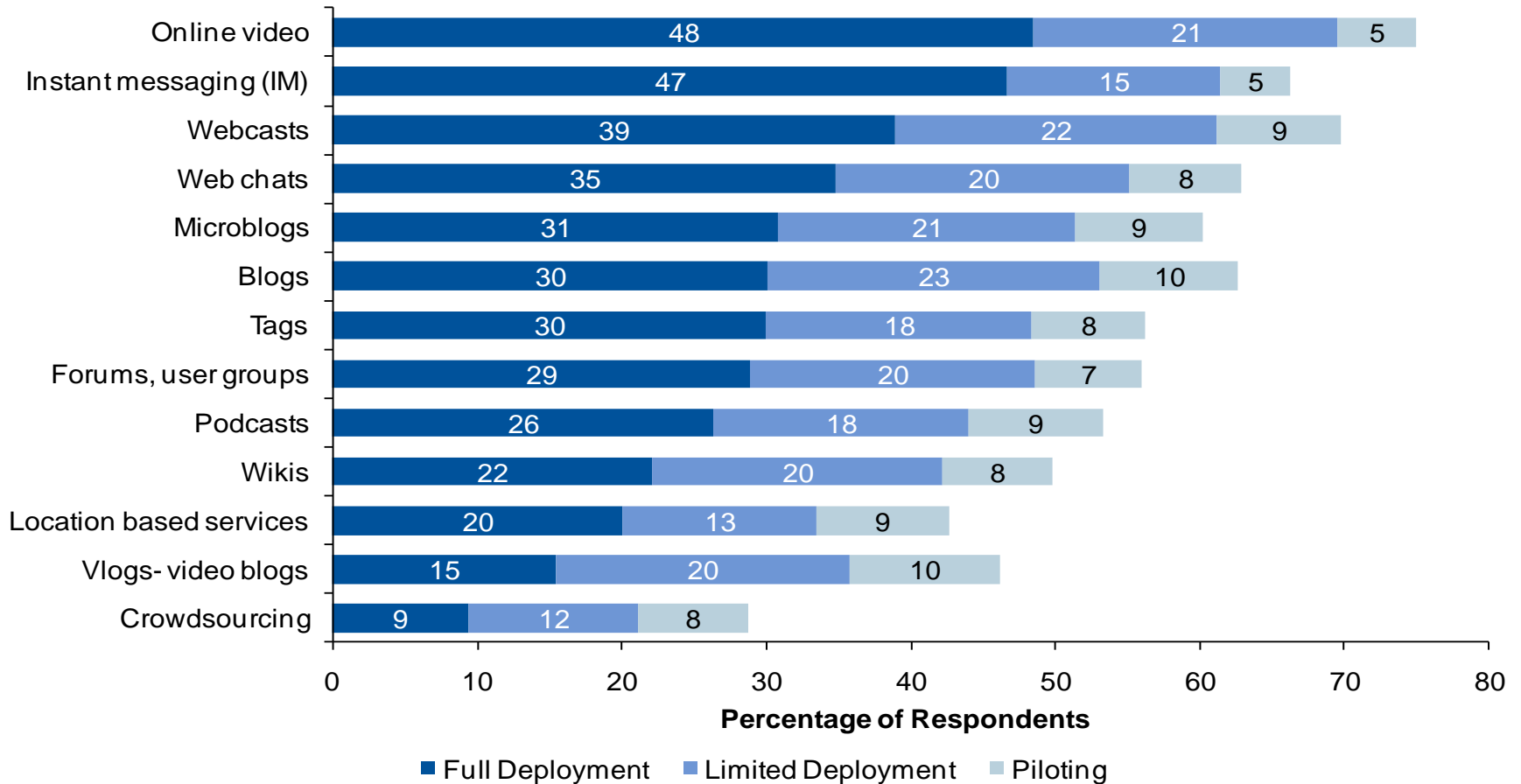


Key Issues

- What are the industry adoption patterns and challenges for social media?
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- How much are companies spending on social media and who owns the budget?

Tools: What's Hot and What's Not

Q: Thinking about your organization's social software deployments for collaboration and social networking in the workplace, please indicate what phase of technology adoption your organization is currently in for each tool?

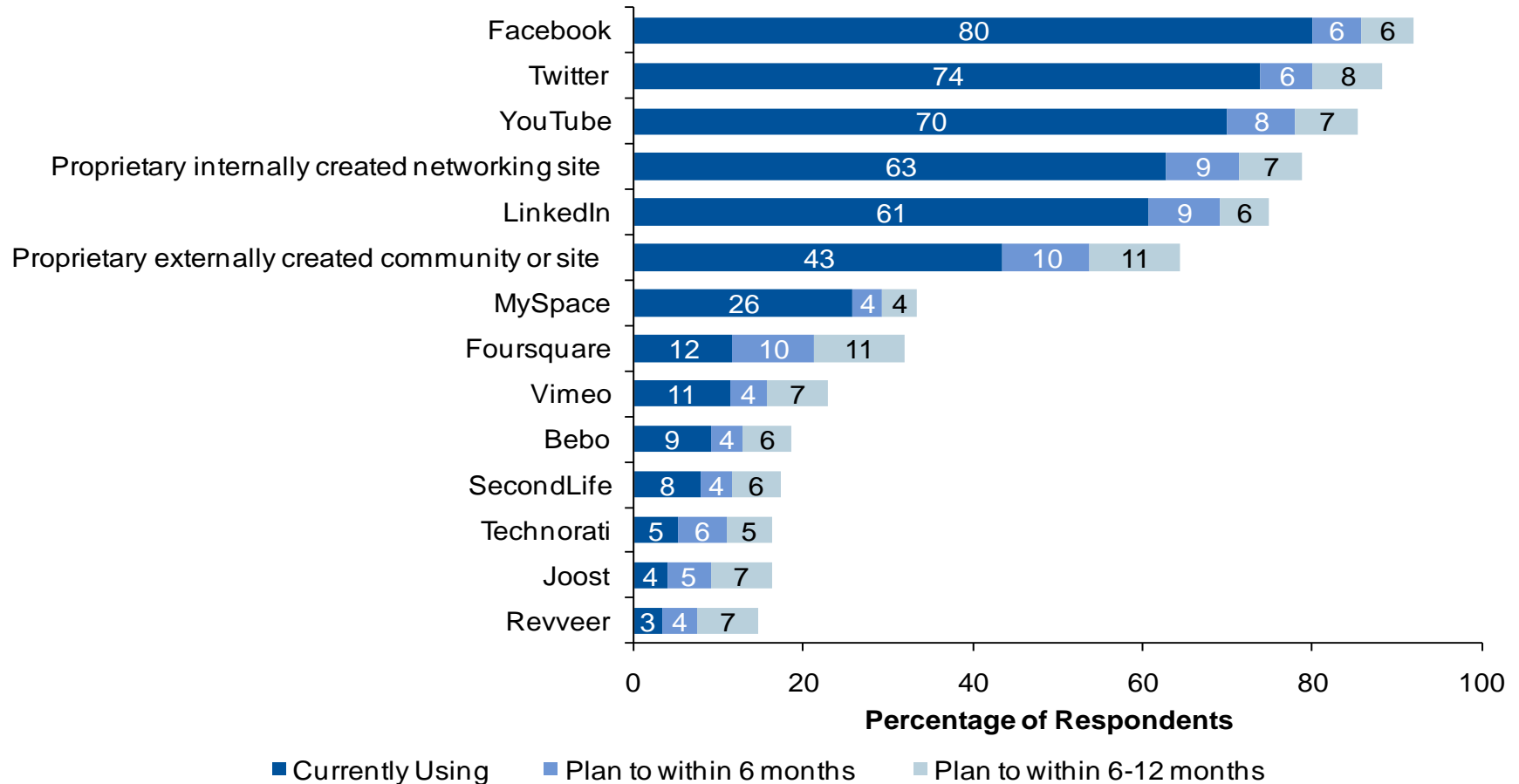


N = 798

Source: Gartner Social Media Survey, March 2011

Social Networking Sites: What's Hot and What's Not

Q: For each of the following social network sites, please indicate whether your organization currently uses that site, plans to use in the next six months, plans to use in the next six to 12 months, or has no plans to use in the next 12 months.



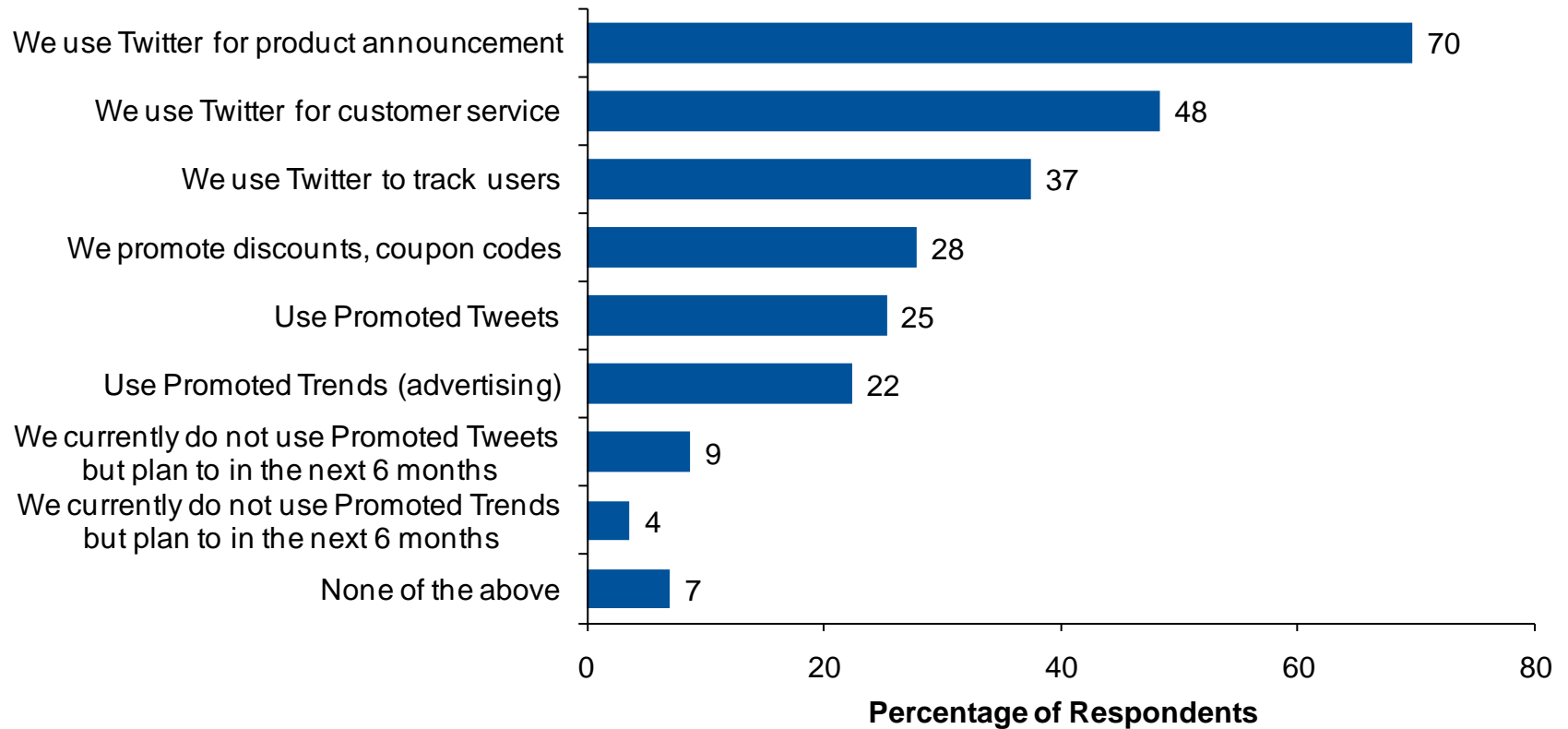
N = 798

Source: Gartner Social Media Survey, March 2011

Customer Service on Twitter



Q. Which of the following statements describe your organization's activities on Twitter?



N = 590

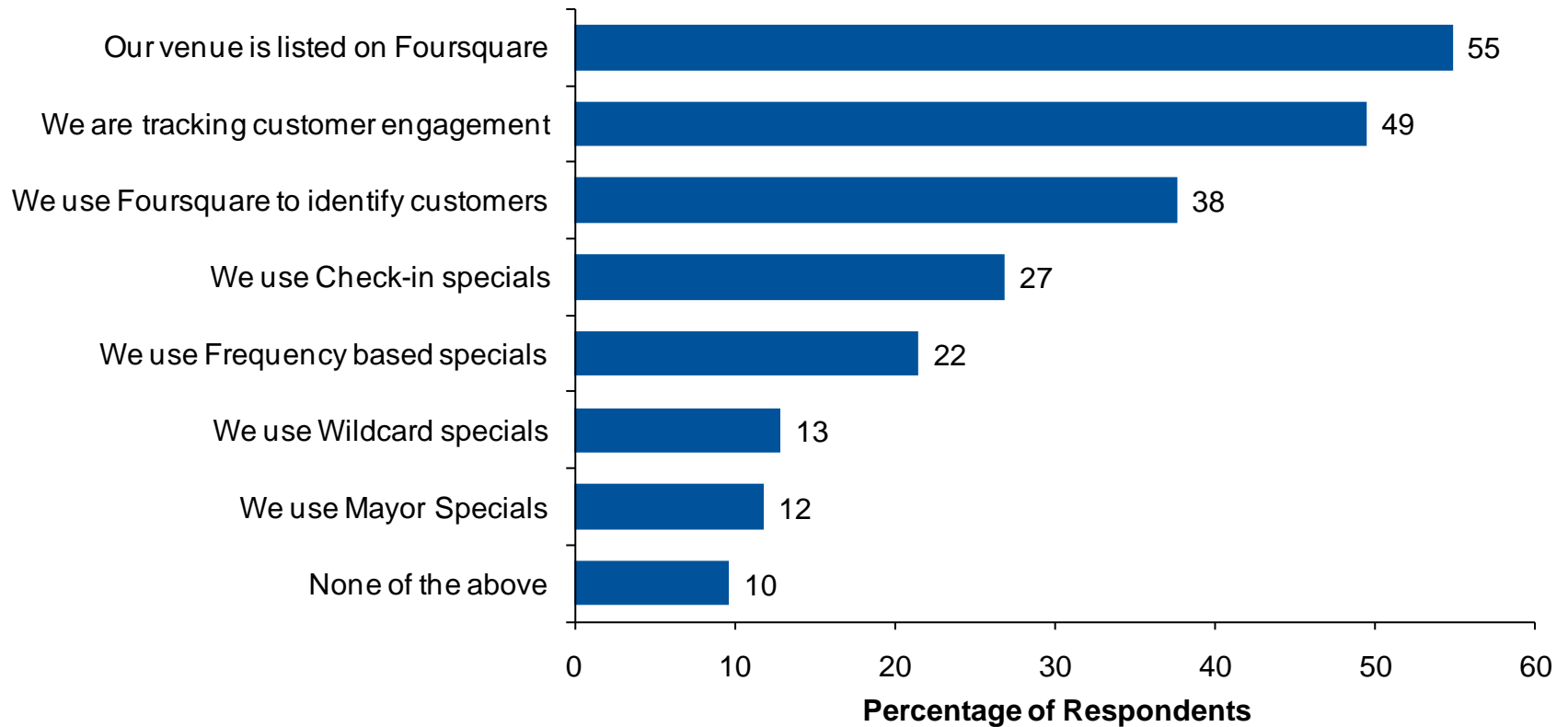
Multiple responses allowed

Source: Gartner Social Media Survey, March 2011

Context Aware Computing: Foursquare for Business



Q. Which of the following statements describe your organization's activities on Foursquare?



N = 93

Multiple responses allowed

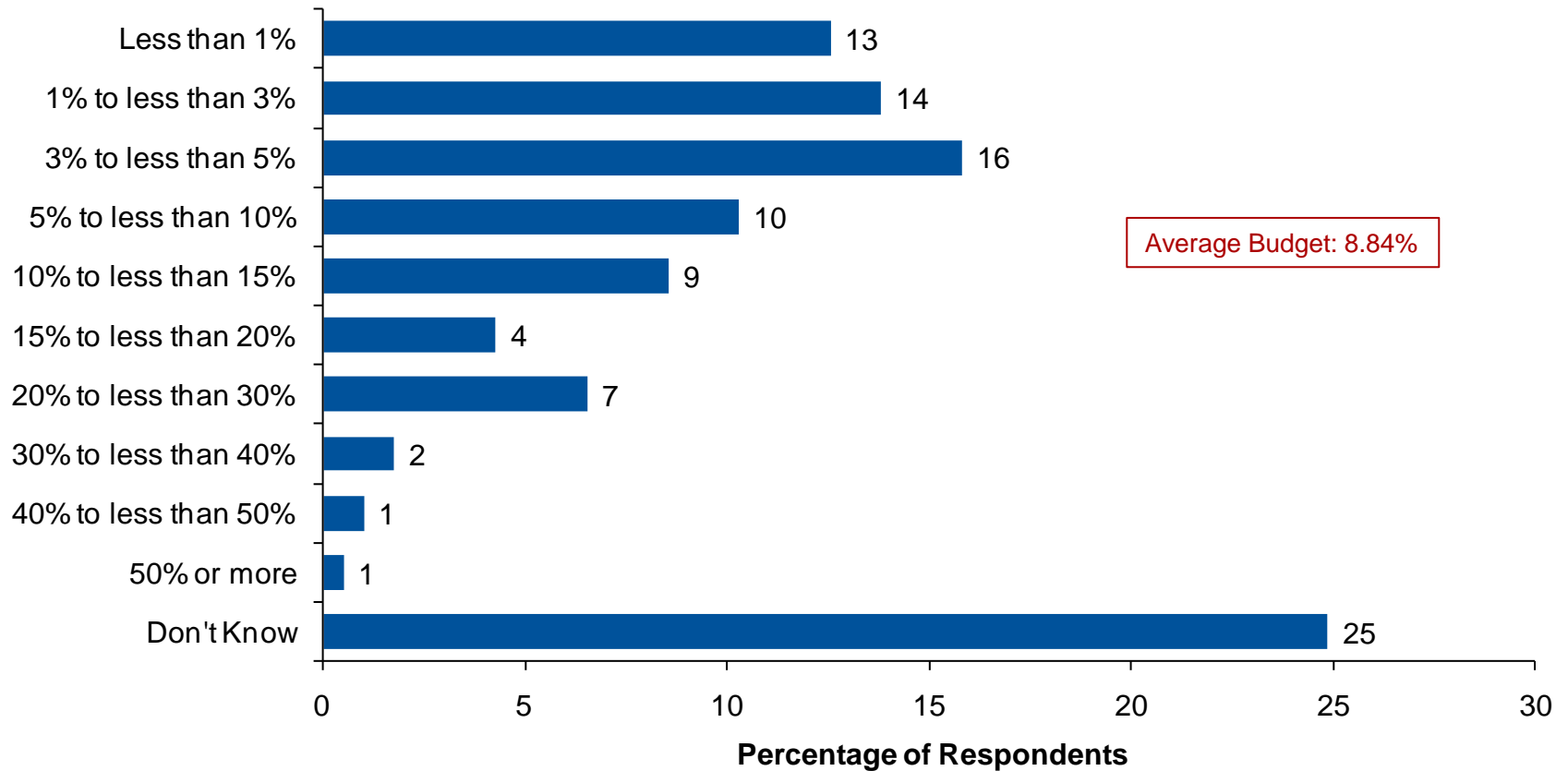
Source: Gartner Social Media Survey, March 2011

Key Issues

- What are the industry adoption patterns and challenges for social media?
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Social Media Ad Campaign Budgets

Q: What percentage of your organization's advertising campaign budget in fiscal year 2010 is allocated to social media advertising spending?

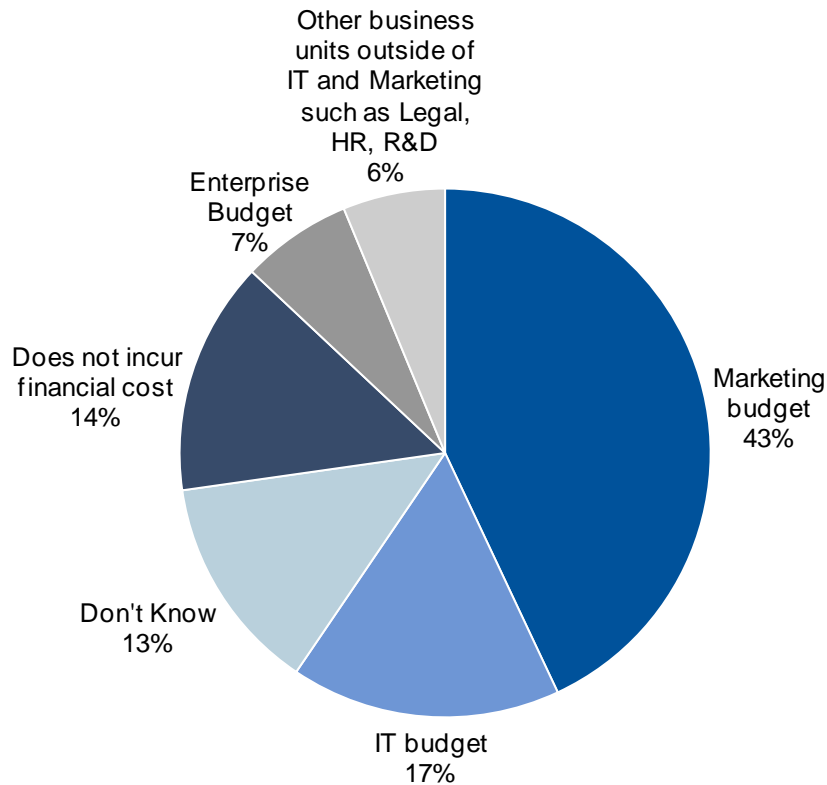


N = 398

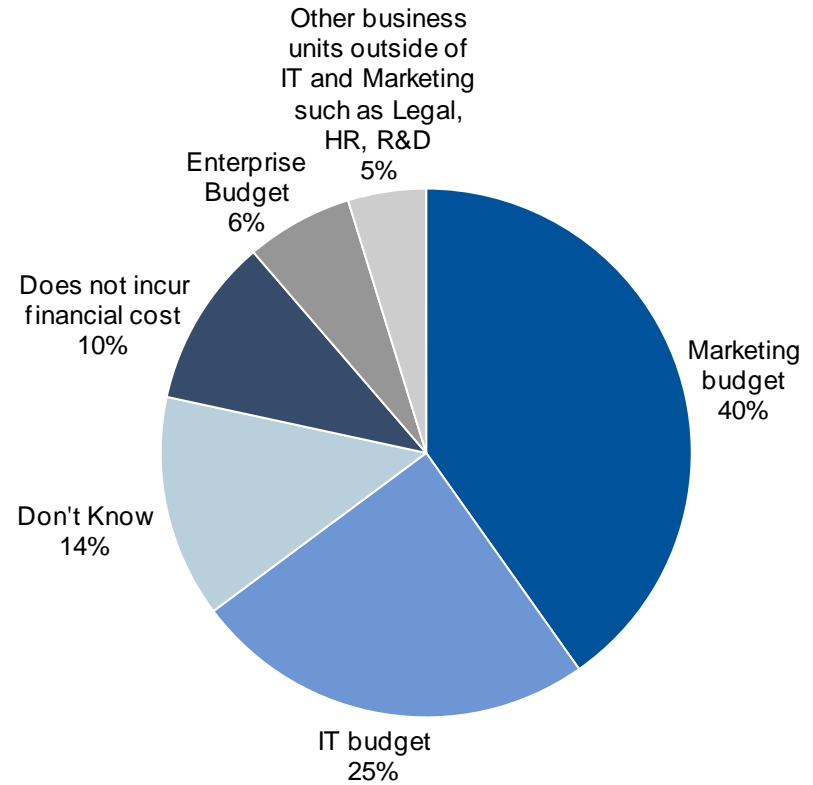
Source: Gartner Social Media Survey, March 2011

Majority of Social Media and Collaboration Software Costs from Marketing Department

Q. Which of the following best describes the cost structure of social media and collaboration tools and software within your organization?



U.S. Respondents (N = 172)



U.K. Respondents (N = 160)

Source: Gartner Social Media Survey, March 2011

Key Findings from Social Media Study

- While Facebook, YouTube, and Twitter lead in social networking sites, respondents show interest in FourSquare for 6 to 12 months out
- Video Dominates Social Media Tool Adoption
- Twitter Use of Customer Service Gaining Traction
- Communications Industry Leads in Tool Adoption and Media Industry Leads in Social Networking Site Adoption.
- Social Media and collaboration software costs mostly originate from Marketing Department.

Recommendations

For IT Marketers

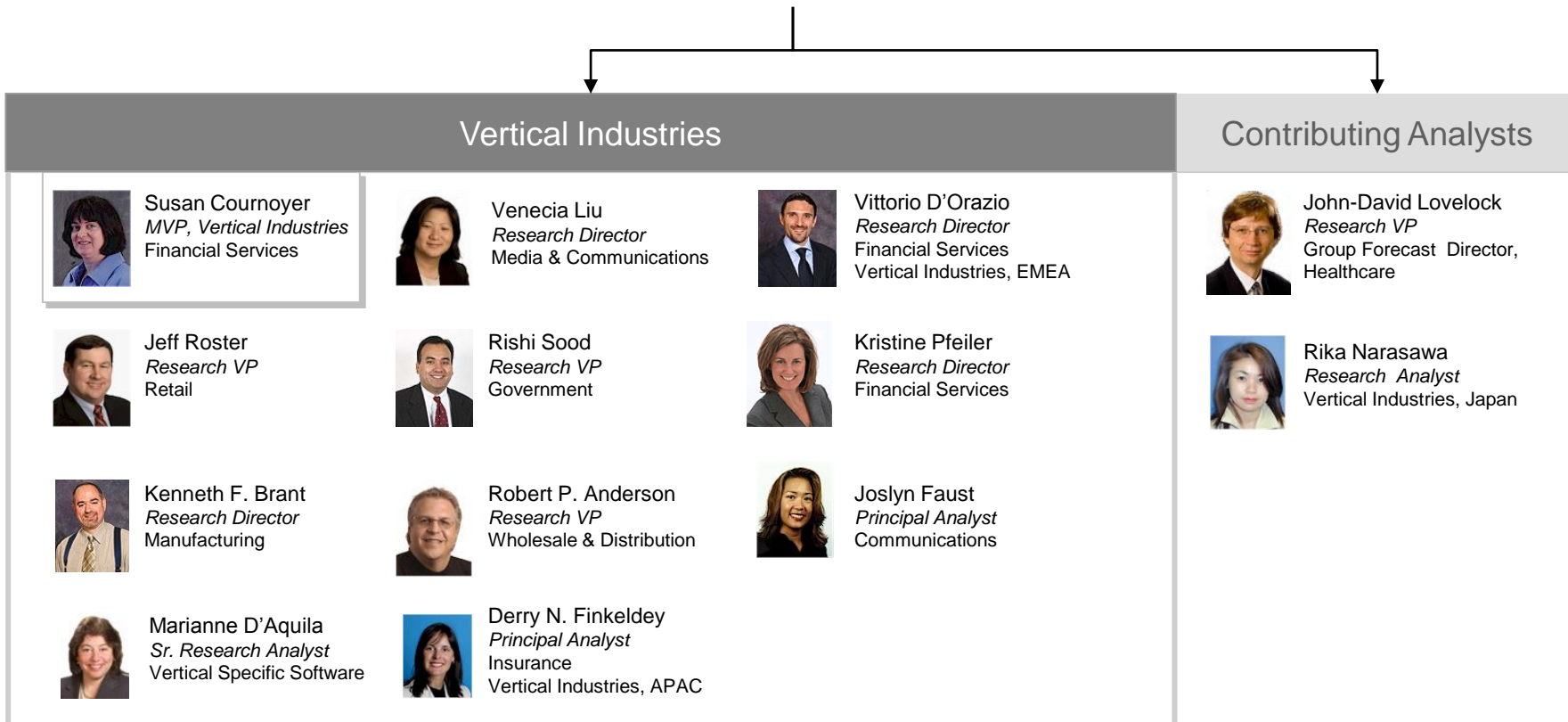
- ✓ Integrate Social Media into the Corporate Communications Plan
- ✓ Build Brands on targeted Channels
- ✓ Set Policy and Conduct Media Training for Participants
- ✓ Establish a R3 Team (Recourse, Real-Time, Response) Team
- ✓ Monitor Social Media Channel

For Tech Providers

- ✓ Track and investigate market players- software, monitoring tools, etc. - it continues to morph
- ✓ Target specific messaging to key stakeholders and industries
- ✓ Identify key business processes by industry, social BPM
- ✓ Build architecture and workflow to link social media into overall IT systems (database, content management systems)



Robert L. Goodwin MVP
 Vertical Industries and Software Research Group
 Transportation



Published Research

- User Survey Analysis: U.S. and U.K. Social-Media Activity and Adoption Across Industries, 2011
- Market Trends: Social Media in Banking and Investment Services, Western Markets, 2011
- Business Gets Social
- Case Study: Using Social Media to Deepen Partner Relationships, an Inside Look at the Oracle Partner Network
- Magic Quadrant for Externally Facing Social Software
- Toolkit: Employing a Purpose Road Map to Build and Execute a Social-Media Strategy
- Defining A Social Media Strategy: Identify Audience and Engagement
- Social BPM: Design by Doing
- Market Share: Web Conferencing, Teaming, and Enterprise Social Software, Worldwide, 2009
- Market Trends: Web Content Management Market is Driven by Enhancements to Online Channels, Worldwide, 2010
- Look Beyond Marketing for Competitive Advantage With Social Media
- The Six Core Principles of Social-Media-Based Collaboration

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