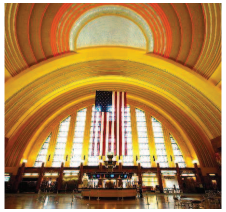


VEHR
COMMUNICATIONS

2010 Media Trust and Usage Survey

A discussion of the results of a survey of
Greater Cincinnati business people
designed to assess their usage and trust in media,
online usage and behavior,
and social media participation.

A Publication of Vehr Communications, LLC (January, 2011)

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Dear Reader:

Welcome to the first-ever Vehr Communications Media Trust and Usage Survey. We're very excited to share with you data that enables us to better understand how Cincinnati-area business people consume and trust news, what they think of social media and how they participate online.

We found the results to be fascinating in many cases, interesting in several more, and concerning in others:

- Which local news source is the most used?
- Do Cincinnati business people think there is bias in news delivery?
- Do they think national news is more biased than local news?
- How involved are area business people in social media?
- Do they carry a smartphone?
- Are Cincinnati professionals toting around more Blackberrys, iPhones or Droids?
- Have tablet readers found a use among area business people?
- Are Cincinnati business people prepared to protect their companies' reputation from online attacks?

We learned much about the attitudes and opinions of the Cincinnati business community from this survey. What we learned will make us smarter strategists and counselors for our clients. As strategic communications professionals, we also learned that there is more that we want to understand. And, as we all know, with social media the landscape is ever-changing and, with those changes, how we use and trust the media constantly evolves.

We hope you value this report. We appreciate your interest.

Sincerely,

Nicholas J. Vehr
President

Contents:

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Methodology:

Vehr Communications designed and conducted an online quantitative survey to assess the attitudes and opinions of Greater Cincinnati business people about media trust and usage.

The survey was designed to assess the opinions and attitudes of those business professionals in three categories:

- **Media trust.**
- **Online usage and behavior.**
- **Social media objectives and analysis.**

An online survey created with Survey Monkey was accessed by 261 respondents between November 29, 2010 and December 10, 2010. The survey was distributed to email lists owned by Vehr Communications and its employees and was promoted through various social media networks of Vehr Communications employees and acquaintances.

The audience that accessed the survey is primarily the Greater Cincinnati professional community, based on Vehr Communications employee knowledge of the contacts in the email lists utilized and responses to demographic questions provided in the survey.

Responses to standard demographic questions enabled us, through crosstabs, to identify respondents by, for example, their career level (e.g. “C-suite” defined as CEO, COO, CFO, CMO, CIO, etc.).

As a quantitative and elective online survey, the results cannot be considered as either random or scientifically valid. The results can be considered an informed and instructive look at Greater Cincinnati business people’s perceptions about traditional and online media trust and usage during the survey period.

Executive Summary:

There is much in the Vehr Communications Media Trust and Usage Survey that we found to be of great interest. We realize, of course, that each reader will review this data from his or her own context. With that in mind, however, we provide this Executive Summary with focus on the items we found to be of particular interest and what we think will be important to watch in the future.

Media Trust and Usage Summary:

- **Greater Cincinnati business people stay informed from a combination of online and traditional sources.** 19% cited Internet sources like social media websites or Yahoo News; 18% cited the local newspaper website; and 15% cited the local newspaper.
- **The *Cincinnati Enquirer* and *Cincinnati.com* lead as the source for news and information** among area business people, with a very strong 86% indicating they were "likely," "very likely" and "somewhat likely" to sit down with the newspaper and/or its news website. **The *Business Courier and bizjournals.com/Cincinnati* followed at 70%.**
- **Cincinnati business people trust national newspapers (95%) more than local newspapers (87%)**, although both ratings are high. Interestingly, 77% of respondents assumed there was bias demonstrated by national outlets compared to 61% for local outlets.

What to watch for the future: Media consumption habits are changing rapidly. Market segmentation, influenced significantly by online micro-segmentation, is a key driver. How that affects the current media landscape brings to mind two immediate questions:

- Traditional print newspapers have been pronounced as things of the past. Will they actually die? Will they continue to evolve with their online presence and associated niche publications?
- How can people trust national newspapers more than local newspapers yet assume there is more bias nationally than locally. Will this inherent contradiction be reconciled?

Online Usage and Behavior Summary:

- **85% of Cincinnati business people responded that they engaged in social media.** While all job levels can be considered as active users, 78% of C-Suite, 80% of senior management, 91% of middle management and 100% of entry level respondents engage in social media.

- **76% of respondents carry a smartphone,** with 46% using a Blackberry, 31% using an iPhone and 16% carrying an Android phone. Smartphone users access Facebook more than any other social media website.
- **Less than 20% of Cincinnati business people use a tablet reader.**

What to watch for the future: Without question, participation in social media will continue to grow; and, we expect that active participation will increase up the ranks within companies.

  - What will this mean for how companies' manage important relationships with employees, shareholders, customers, the media, vendors, communities and others?
  - Will reputation management remain the domain of the CEO and the Chief Marketing Officer, or will the proliferation of message channels through social media loosen the reins on this important function? If so, is it a better representation of the company's personality via the voice of its employees, or does it simply increase the possibility or probability of online mischief from disgruntled employees?
  - How will the growing usage of mobile devices and tablet readers change the way we do business?

Social Media Objectives and Analysis Summary:

- **While "active" in social media, Cincinnati-area business people may not be "interactive."** When asked about their company's business objective for participation in social media, 45% suggested "brand awareness" and 30% answered "sharing product/service information." Only 3.% indicated "customer service" as a business objective.
- **Clarity on social media success measurement is not so clear.** 54% of respondents thought that qualitative measurement through anecdotal successes, improved perception or word-of-mouth were the way to go. 46% feel that quantitative measurement – clicks and website traffic – is best.
- **Certainty on social media monitoring and online reputation management is lacking.** 33% of business people were "unsure" how quickly their company was able to respond to a social media inquiry or attack. More than 15% said their company did not respond using social media.
- **Concern about responding online is also lacking.** Slightly more than 33% of respondents were either "yes, somewhat" or "yes, very" concerned about their company's ability to quickly respond to social media attacks or inquiries; 47.7% were either "unsure" or indicated "we don't respond" when asked how quickly their company was able to respond to social media inquiries or attacks.

What to watch for the future: The power of social media is in the reality that it is social – it is built for and demands interaction. Businesses are increasingly learning the value of social media monitoring and, beyond that, the importance of interaction.

  - As the social media landscape continues to change, how will measurement tactics and companies' assessment of effective metrics, evolve?
  - Will companies change the way they use social media to develop, maintain and strengthen their relationships with key audiences, or will they continue to view it as a one-way flow of information?
  - How will social media monitoring tools become more sophisticated for business use?

Media Trust:

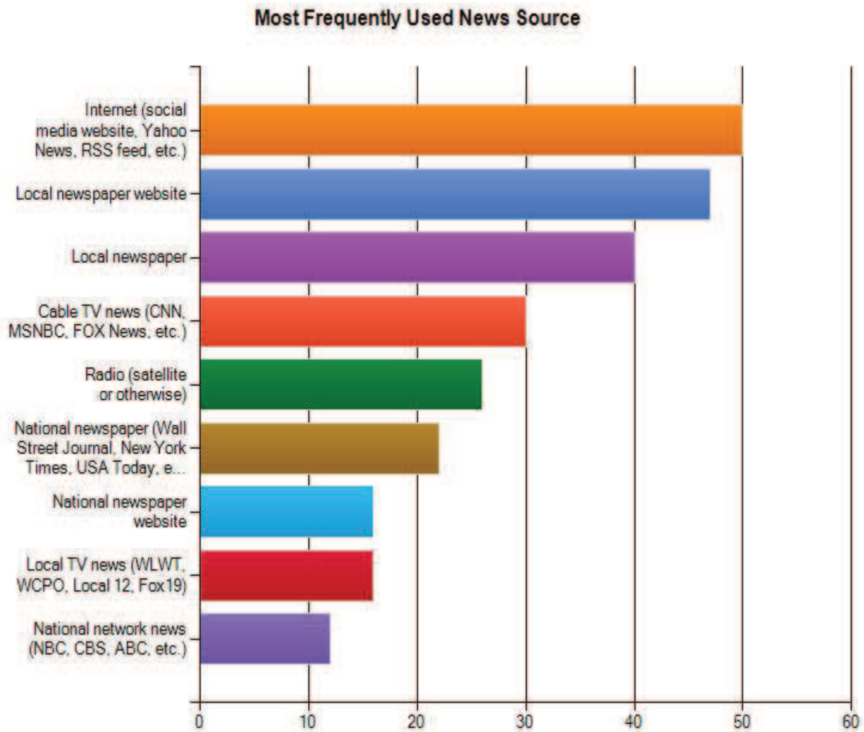
First for News

When Cincinnati business people were asked to identify the news source they most frequently use to stay informed, Internet sources like social media websites or Yahoo News received the greatest response at 19%. Following closely behind were the local newspaper website (18%) and the local newspaper (15%).

Provided that they offer the same content, it is reasonable to say the local newspaper and its complementary website are the most frequently used news source for Cincinnati business people, with a combined 33%.

Looking closer at survey respondents, it is clear that online news sources are transcending generations.

- The top response for favored news sources in the **18-24 yr.** and **25-34 yr.** groups was the **Internet**.
- For the **35-44 yr.** and **45-54 yr.** groups it was the **local newspaper website**.
- Only the **55 yr. and above** group indicated a preference for **print news**, with 26% of the group identifying the local newspaper as its choice source, with cable TV news not far behind at 24%.

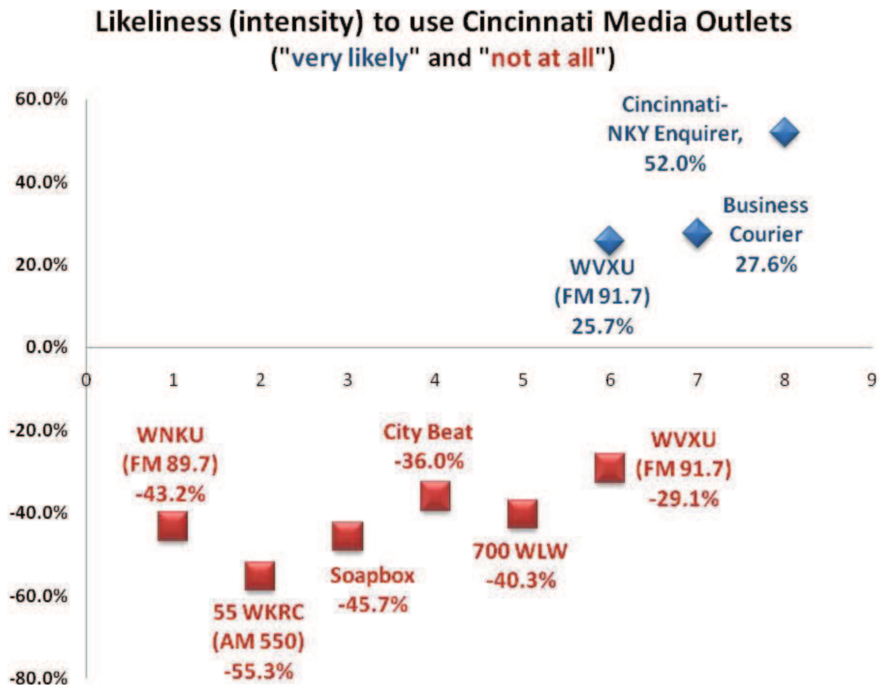


Following a repeated trend in later questions, the identified age groups mirrored their selected job titles, with C-Suite behaving similarly as 55 yr. and above, middle management and senior management following the 35-44 yr. and 45-54 yr. groups, and associate and entry-level mimicking 25-34 yr. and 18-24 yr. categories.

Local News Choices

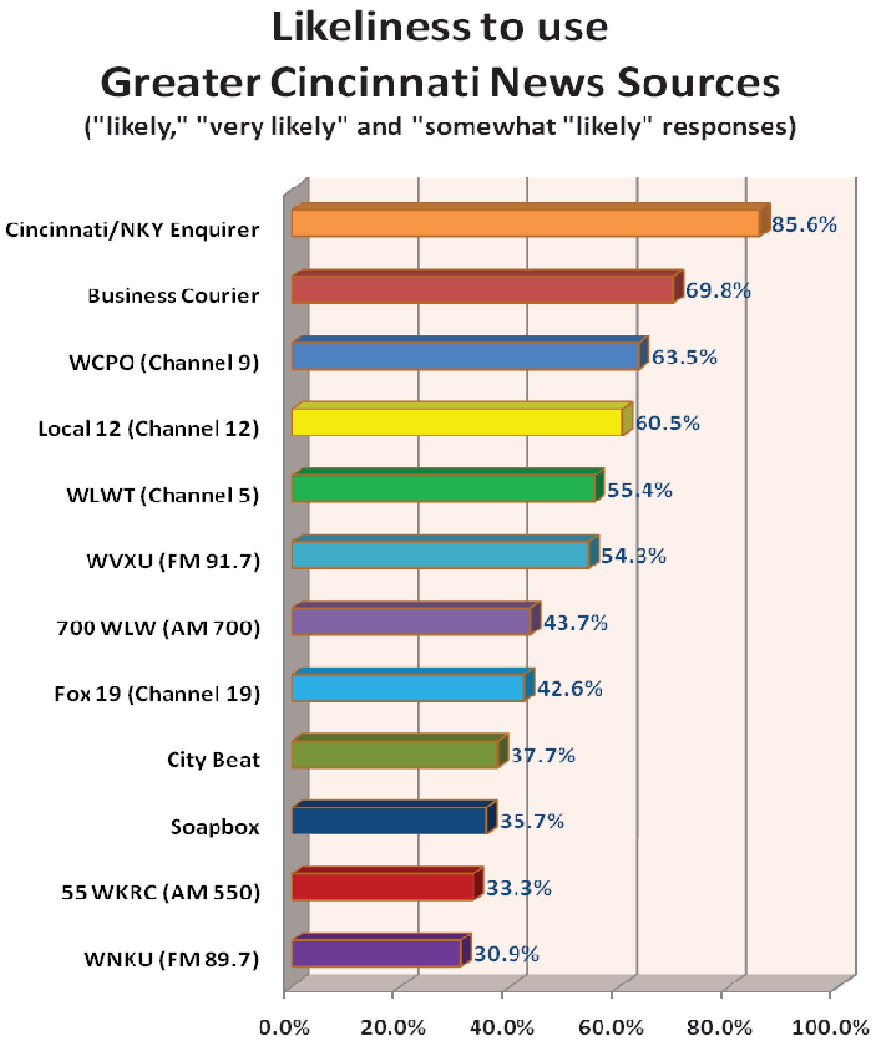
Print and online journalism are strong media players among Greater Cincinnati business people, with 52% of respondents stating they were "very likely" to use the *Cincinnati Enquirer* and *Cincinnati.com* for news and information. Including the "likely" or "somewhat likely" responses, a commanding 86% of those surveyed responded positively to using the *Cincinnati Enquirer* and its website content.

The C-Suite respondents, in particular, were "very likely" (49%) to read the *Cincinnati Enquirer* and *Cincinnati.com*. 85% of the C-Suite audience responded positively ("very likely," "likely" and "somewhat likely") to the *Cincinnati Enquirer* and its website content, with just 15% saying they were "unlikely" or "not at all likely" to use the *Cincinnati Enquirer/Cincinnati.com*. **This learning suggests that the *Cincinnati Enquirer/Cincinnati.com* is read regularly and carefully by the C-Suite.**



The *Business Courier* and *bizjournals.com/Cincinnati* also enjoyed strong support with 70% of respondents stating they were "very likely" to use them for news and information. Of the respondents, 28% indicated they were "very likely," 21% indicated they were "likely" and 21% indicated they were "somewhat likely" to read the *Business Courier* or its website content.

With the C-Suite audience, the *Business Courier/bizjournals.com/Cincinnati* performed at a similar level to the *Cincinnati Enquirer/Cincinnati.com*, with 46% indicating that they are very likely to use the news source. **The *Business Courier* outlets fared slightly better than the *Cincinnati Enquirer* outlets, with an 89% positive rating from the C-Suite.** Like the *Cincinnati Enquirer* outlets, this endorsement suggests that the C-Suite is regularly and carefully reading the *Business Courier* outlets.



Where the *Business Courier* drops sharply is with associate and entry-level employees, who are just 38% and 50% positive, respectively. The *Cincinnati Enquirer*, comparatively, experiences some drop-off in this audience, but there remains a relatively high likeliness for these groups to use the newspaper (77% and 75%, respectively).

When respondents were asked which television stations they used regularly for news and information, WCPO (channel 9) WLWT (channel 5), and Local12 (channel 12) received similar intense ("very likely") positive responses, with 13% for WCPO, 12% for Local12, and 11% for WLWT. Fox 19 was the exception, with only 4% very likely to tune into the station. Overall positive ratings followed a similar trend. 64% of respondents indicated they were "very likely," "likely" or "somewhat likely" to turn on WCPO, Local12 received 61% and WLWT got 55%. 43% of respondents were positive about Fox19.

The radio stations surveyed fared similarly, with the exception of WVXU. 26% of respondents shared that they were "very likely" to use WVXU for news. This far outweighed other radio outlets, even WLW, that received just 11%. When combining "very likely," "likely" and "somewhat likely" responses, WVXU received 54% positive rating, a number more comparable to responses for television news stations as news sources.

WVXU performed well with specific audiences, which may have influenced the overall numbers. Approximately one-third of C-Suite and senior management respondents indicated that they were very likely to tune into WVXU. In addition, the 55 yr. and over age group was 39% very likely to listen to WVXU.

Media Trust Assessments

Cincinnati-area business people trust national newspapers and network TV news with greater intensity (majority who responded that they trusted the outlet "very much") than they do local newspapers and local TV news (majority who chose "somewhat"), but shared that they perceive the general media to have greater bias than local outlets.

National newspapers, in particular, have exceptionally high levels of trust, with a 95% positive rating (77% assumed there was bias demonstrated by national outlets, compared to 61% of local outlets).

The local newspaper (*Cincinnati Enquirer* and *Business Courier)* fared well, with an 87% positive rating, the third-highest. Following behind were local TV news (82%), radio (81%), Internet (81%), national network news (80%) and cable TV news (76%).

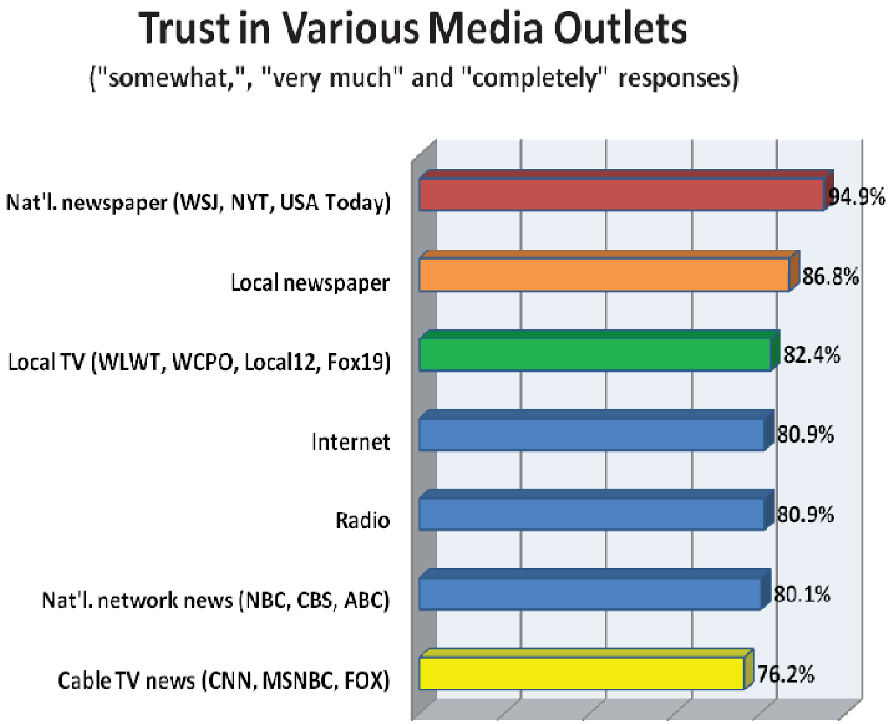
Online encyclopedias, like Wikipedia, got a higher trust rating (77%) overall than cable TV news. Also above 50% were news blogs (Huffington Post, Drudge Report and Gawker Media).

Just under the 50% threshold were satirical news programs (*Daily Show*, Colbert Report, Saturday Night Live) at 46%.

Toward the bottom of the trust scale were commentator shows (O'Reilly Factor, Rachel Maddow Show) with 38%.

The least trusted by a significant margin were talk shows (*The View*, Oprah, Dr. Phil), which received only a 24% overall positive rating. Intensity against talk shows was also the highest, with 38% of respondents indicating that they trusted talk shows "not at all."

Media trust is universal in the Cincinnati professional community, looking at crosstab data for age and job title. Across the varying ages and job titles, there was consistent agreement on the majority response for every outlet respondents were asked about – a statistical phenomenon.

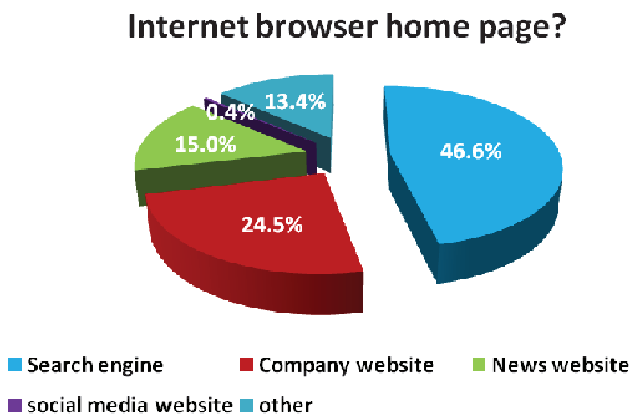


Online Usage and Behavior:

A Place to Call Home

Search engines (Google, Yahoo, Bing, etc.) were the most popular Internet browser home page, with 47% of Cincinnati-area business people loading a search engine. Company websites were at 25%, followed by news websites.

Less than 1% of respondents had a social media website as their Internet home page, but if one social media website is successful, that will change. Facebook started a push in November 2010 asking users to make it their default homepage with a new “Make Facebook Home” button that appears at the top of user’s profiles. We will be interested to learn next year if Facebook sparked a change in behavior.

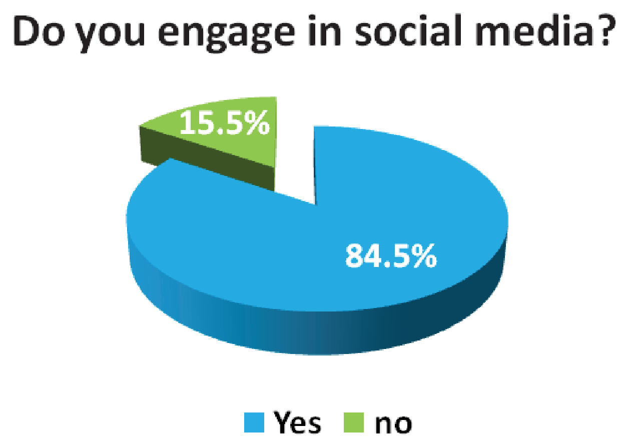


Cincinnati is Social

85% of respondents said they engage in social media, a clear indication that social media is relevant and widespread in the local business community. Of those users, 84% of social media users’ companies allow them access to social media at work.

Of the small sample that does not allow access at work, Facebook is the most blocked social media outlet (89%), followed by Twitter (67%). LinkedIn is the least blocked (26%).

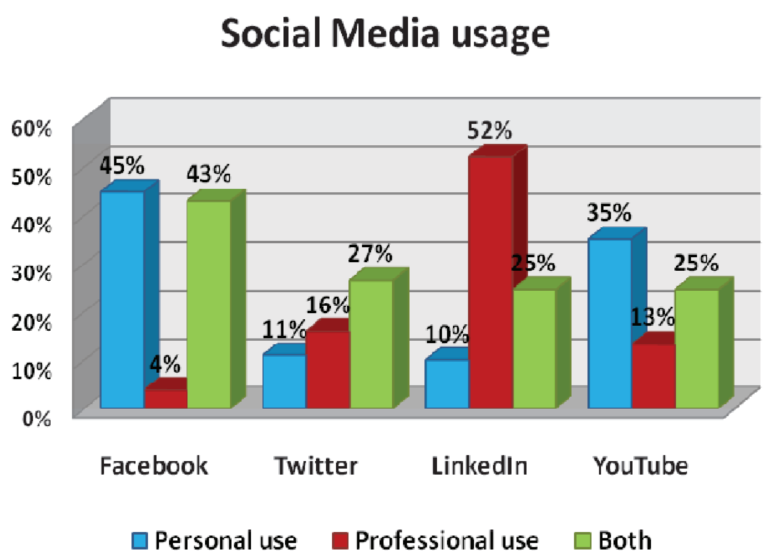
Looking deeper at the user profile, 78% of the C-Suite is using social media, similar to senior management (80%) and associates with 3-5 years experience (82%). While all job levels can be considered active users, 91% of middle management professionals and 100% of entry-level professionals engage in social media.



Social Media is Personal and Professional

When respondents were asked if they used individual social media websites for personal use, professional use or both, how they use social media was telling.

Facebook was split almost evenly between personal use (45%) and both personal and professional use (43%). This ratio shows the prevalence of Facebook in the personal lives of users, but also the outlet's reach in the professional world. It directly contradicts LinkedIn, which is dominantly used professionally.



The C-Suite was the least likely to use Facebook, but "least" is qualified as just 15%, placing 85% of Greater Cincinnati's business leadership in the ranks of the 500 million Facebook users. The C-Suite is the most likely to use Facebook purely for professional use, at 8%, which indicates an awareness of the power of Facebook to enhance their businesses.

A narrow majority of respondents indicated they used Twitter, most for professional use or for both personal and professional use; however, 47% of respondents indicated that they do not use Twitter at all. Compared to the 92% of Internet users nationwide who do not use Twitter (Pew Research Center), Greater Cincinnati has a high rate of users, but there is a clear disconnect when compared to 9% of respondents who do not use Facebook or the 13% who do not use LinkedIn.

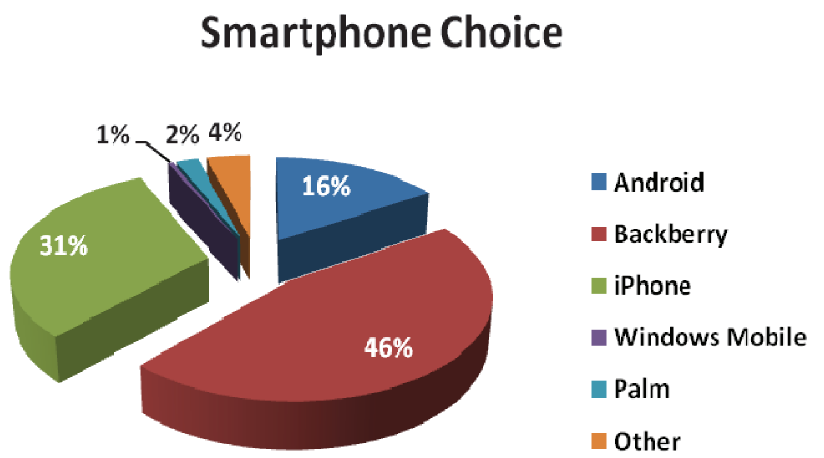
Mobile social media (often referred to as geo-location) has not yet caught on in Greater Cincinnati, with 83% of respondents not using Four Square and 97% of respondents not using Gowalla. While these usage numbers may shift as geo-location marketing grows, at present, the business community is not "checking in" to mobile social media.

Cincinnati is Smartphone-Connected

76% of respondents have smartphones, a clear indication that the potential for mobile social media is significant, despite the current lack of participation.

46% of respondents indicated they used Blackberry phones, making it the dominant smartphone choice. The iPhone was second at 31% and Android third at 16%, mimicking national statistics.

Blackberry phones were the most popular with the more senior-level respondents (C-Suite, senior management and middle management), whereas iPhones were more prevalent in the associate and entry-level populations.



Smartphone Usage

More than 71% of smartphone users access the Internet using their mobile device (36% - "very often" and 35% - "often"). The vast majority are accessing Facebook when they do so (83%), with fewer going to Twitter (46%), YouTube (42%) and LinkedIn (36%).

Interestingly, there is a direct correlation between smartphone usage and company seniority. C-Suite and senior management are the most likely to use smartphones at 85% each, and entry-level employees are least likely at 44%.

Tablet Reader Usage

Usage of tablet readers, a coming trend for business users, is still very low among Cincinnati business people. Only 19% indicated that they use a tablet reader, with 81% saying they do not. How this evolves in coming years is a business trend worth following.

Social Media Objectives and Analysis:

Social media is just that, social. As the medium has grown in reach, it has also grown with regard to business potential. That potential has come with a caveat: social media shifts message control away from the business and puts it in the hands of consumers.

The new two-way street is an adjustment for companies and the survey shows that some organizations have not yet adapted to the new normal, but there is clear indication that businesses are accepting and working to integrate social media.

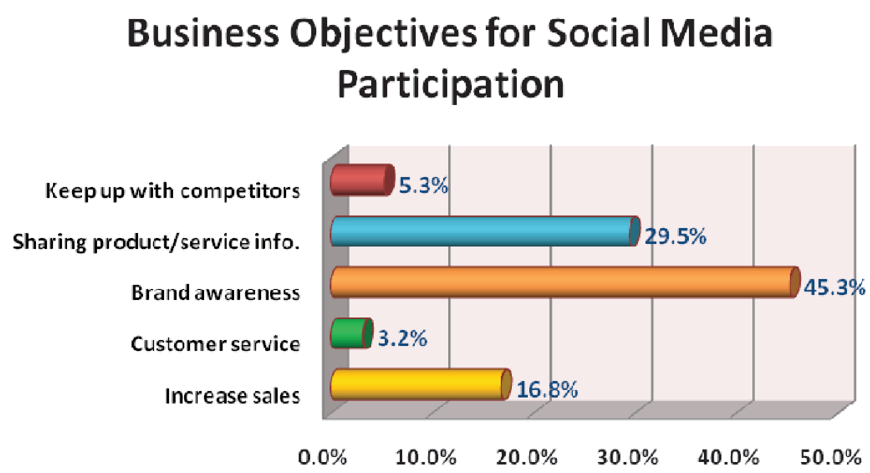
Social Media Objectives

In terms of company objectives for participation in social media, "increasing brand awareness" was the top response by a 15-point margin, with 45% of respondents stating that was their most important social media objective.

Beyond increasing brand awareness, 30% of respondents indicated "sharing product or service information" was their primary objective, 17% said "increasing sales," 5% wanted to "keep up with competitors" and just 3% indicated that "customer service" was their objective.

Interestingly, the purpose of social media is to encourage interaction, but customer service, seemingly the best option where interaction is inherent, was at the bottom of the list by a large margin.

Looking at C-Suite respondents, specifically, zero respondents identified "customer service" as a business objective for participation in social media.



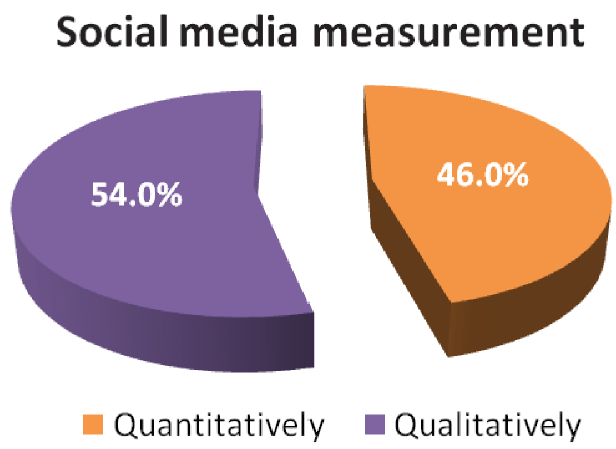
These findings suggest that there is an "export-only" nature to many Cincinnati-area businesses' social media programs – that social media is seen more for its "push-out" potential than for its "interact with" potential. As knowledge about and interaction with social media increases among Cincinnati-area business people, it will be valuable to observe how respondents' priorities shift over time … whether a more balanced "export/import" ratio evolves.

The ROI Debate

Social media measurement to determine return-on-investment (ROI) is a recurring debate given the inherent challenge of measuring impressions and the feasibility (or, lack thereof) of realistically assessing value to those impressions. Despite these challenges, measurement remains an omnipresent and very important question.

Respondents were asked how they feel social media investment is best measured, whether quantitatively or qualitatively. They were generally split on the issue:

- 54% of respondents indicated that qualitative measurement, through "anecdotal successes," "improved perception" and "word-of mouth," were the best success metric.
- 46% feel that quantitative measurement – clicks and website traffic – is best.



There was a clear generational difference to this question, with 55 yr. and above respondents finding quantitative measurement the most effective (59%) and the 18-34 yr. respondents agreeing that qualitative is best (71%).

This gap was also evident with regard to job title. C-Suite respondents narrowly subscribed to the quantitative philosophy (52%) and the entry-level respondents definitively believed qualitative is best (71%). Similar to social media objectives, measurement philosophies may evolve with social media.

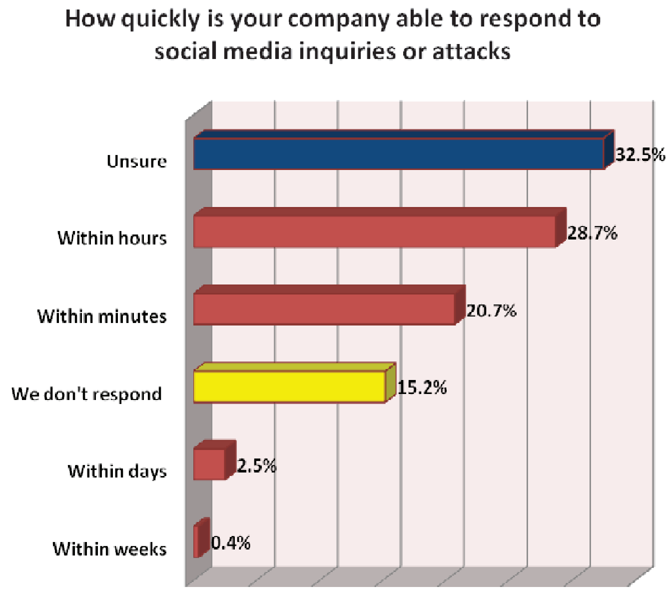
Monitoring Reputation

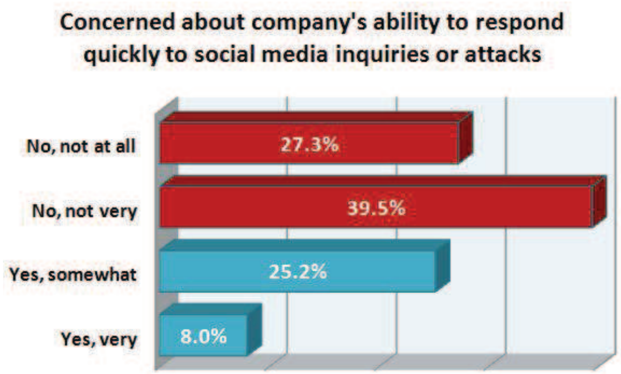
The online conversation is constant and frequent, and monitoring that conversation is critical. However, the majority of respondents (55%) were unsure about their companies' online monitoring efforts.

Approximately a third of respondents shared that they used social media tracking like Social Mention and online alerts like Google Alerts, with 17% using paid media monitoring services like Cision or PR Newswire.

Respondents were asked how quickly their companies are able to respond to social media inquiries or attacks, and 49% indicated within minutes or hours, which should be the response time goal of any company. Only 3% said it would take days or weeks.

More concerning was the 15% who indicated that their companies do not respond via social media. While 15% is a minority, it is a significant enough minority to cause concern. As stated previously, social media is social, and the ability to respond directly to fans and followers is important to an effective social media program.





The most significant takeaway of the social media response question set was about the level of concern respondents feel about their companies' ability to respond quickly to inquiries and attacks. Slightly more than 33% of respondents were either "yes, somewhat" or "yes, very" concerned about their company's ability to quickly respond to social media attacks or inquiries; 47.7% were either "unsure" or indicated "we don't respond" when asked how quickly their company was able to respond to social media inquiries or attacks.

Social media has tremendous potential to improve image, reinforce reputation and create a relatable, human voice online; conversely, social media can do irreversible damage if gone unchecked. Companies often have only minutes, not hours, to respond.

It is clear from the survey responses that the Cincinnati business community is firmly entrenched in social media. It is just as clear that there is still a significant social media learning curve. Future survey results will measure progress and show changing trends in this ever-evolving medium.

Business Blogging Voice

Cincinnati-area companies mirror the Fortune 100, with about a third maintaining a blog (Burson-Marsteller, "Global Social Media Check-Up," 2/23/2010).

Of those companies that blog, the majority of respondents indicated their blogs were updated multiple times a week or more. But where companies are clearly committed to keeping blog content recent, it is apparent that the updating responsibility belongs to a limited population:

- 45% of respondents never contribute to their company blog.
- 19% never have contributed to their company blog but said they were considering it.
- 19% are regularly updating the blog, with 18% sometimes updating the blog. This may suggest one person being responsible for maintaining a consistent voice for the company. Given that the C-Suite respondents were the most likely to regularly update the blog (39%), there may also be a top-down mentality to that voice.

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Demographics:

Gender:	**Male** 56.2%	**Female** 43.8%				
Age Group:	**18-24** 6%	**25-34** 13.7%	**35-44** 22.1%	**45-54** 28.5%	**55 and above** 29.7%	
Company Description:	**B2B – sell to other businesses** 42.5%		**B2C – sell directly to consumers** 57.5%			
Company Size:	**0-50 emp.** 41.1%	**51-100 emp.** 9.1%	**101-500 emp.** 18.7%	**501-1,000 emp.** 12.9%	**1,001-5,000 emp.** 7.5%	**5,001+ emp.** 10.8%
Job Title:	**C-suite** 28.9%	**Sr. Management** 25.9%	**Middle Management** 28.9%	**Associate (3-5 years)** 9.6%	**Entry-level (1-2 years)** 6.7%	

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