

STUDY SOCIAL MEDIA GOVERNANCE 2011

Expertise Levels, Structures and Strategies of Companies, Governmental Institutions and Non-Profit Organizations communicating on the Social Web.



IMPRINT

Stephan Fink, Ansgar Zerfass, Anne Linke:

Social Media Governance 2011 – Expertise Levels, Structures and Strategies of Companies, Governmental Institutions and Non-Profit Organizations communicating on the Social Web.

Results of an empirical study of communications professionals.

Leipzig, Wiesbaden: University of Leipzig/
Fink & Fuchs Public Relations AG.

With special thanks to Katja Rodenhäuser.

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I. Overview

- Key figures and topics
- Initial situation and research questions
- Selected results of the empirical study

STUDY „SOCIAL MEDIA GOVERNANCE 2011“

Key figures

- Survey of communications managers and PR professionals in companies, governmental institutions and non-profit organizations in the German-speaking part of Europe: Germany, Austria and Switzerland (no agencies and consultants)
- Sample size: 596 fully completed questionnaires
- A joint project of the University of Leipzig, pressesprecher magazine (Berlin) and Fink & Fuchs Public Relations AG (Wiesbaden)

Topics of the survey

- Changes in the daily work of communication managers through social media
- Expertise levels and qualification offers for communicating on the social web
- Tools and applications of corporate communications
- Strategies utilized by organizations for social media communication
- General requirements for interactive communication (Governance structures)
- The correlation of expertise levels, strategies, activities and regulatory frameworks
- Development patterns over time: progress and setbacks (compared to the results of the previous study "Social Media Governance 2010")

INITIAL SITUATION AND RESEARCH QUESTIONS

During the past few months, many communication departments have increasingly invested in social media and expanded their activities in this area. The extent of this development and its effect on the daily work of communication managers, who have to accomplish additional tasks, has not been researched yet. How extensively do PR professionals use Facebook, Twitter, YouTube and other platforms? Do they have the required skills and expertise? What qualification measures are offered and utilized? At the organizational level there is the additional question of who is responsible for social media communication, whether comprehensive or platform-specific strategies are being developed, and which platforms and applications are applied specifically.

The previous study in the year 2010 identified that the establishment of a comprehensive regulatory framework for participative communication on the Internet (Social Media Governance) is a significant factor affecting the rooting of social media activities in organizations. Last year, rules (guidelines, key performance indicators) and specific resources (budgets, staff, training) were poorly developed in most organizations. The current study examines the recent developments and determines whether there are again significant correlations between the nature of regulatory frameworks, the existence of sufficient expertise levels, strategies and activities on the Social Web.

SELECTED RESULTS OF THE EMPIRICAL STUDY

- Social media increase the pressure on the everyday workload of PR professionals. The majority feels pressured to be "always on", and 30 percent consider it impossible to accomplish the required extra work. Accordingly, they cite the high effort in terms of finances and personnel (76.0 percent) and potential loss of control (54.9 percent) as the greatest obstacles to the use of social media.
- Even though communication professionals use the social web considerably more extensively than the general population in their spare time, only 22.8 percent evaluate their own social media expertise as high. There is a lack of training courses, primarily in the areas of evaluation and strategic planning.
- 71.3 percent of all organizations currently actively apply social media in their communications. While this is considerable growth over the previous year (54.3 percent), the development is below the optimistic expectations of that time. Almost one in three organizations (28.7 percent) is still not active on the social web.
- To-date, two-thirds of surveyed organizations have social media communication strategies. However, most of these only focus on individual platforms (43.8 percent), while only two in ten organizations have strategies that are related to the entire organization.
- Governance structures for social media were developed further at most organizations. This particularly affected technical resources, the top management support, and social media guidelines. Nevertheless, very little progress was made in the area of key performance indicators for monitoring success; while even fewer respondents than in the previous year confirmed that they had a participative corporate culture, the prerequisite for open communication on the Internet.

II. Methodology and socio- demographics

METHODOLOGY

Polling method and sampling procedure

- Online survey conducted in May and June 2011 (5 weeks)
- Questionnaire containing 22 questions, each formulated based on scientific hypotheses incorporating existing theories and empirical findings
- Personal invitation to participate through the mailing list of "pressesprecher" magazine and the members of the Bundesverband deutscher Pressesprecher (BdP – German Association of Press officers)
- Participants: 596 completed questionnaires

Evaluation

- Statistical analyses based on the methods of social sciences (descriptive and analytical statistics), using SPSS software tools
- Statistically significant group differences were tested with variance analyses, and dependencies were tested via correlations. For this purpose, the correlation coefficient was determined for each instance, either Pearson's or Spearmans Rho, depending on the data volume. The higher these values, the stronger the correlation – with a maximum value of 1 with an overall probability value of $\alpha = 0.05$. Significant facts are listed in the footnotes.

SOCIAL DEMOGRAPHICS OF THE PARTICIPANTS

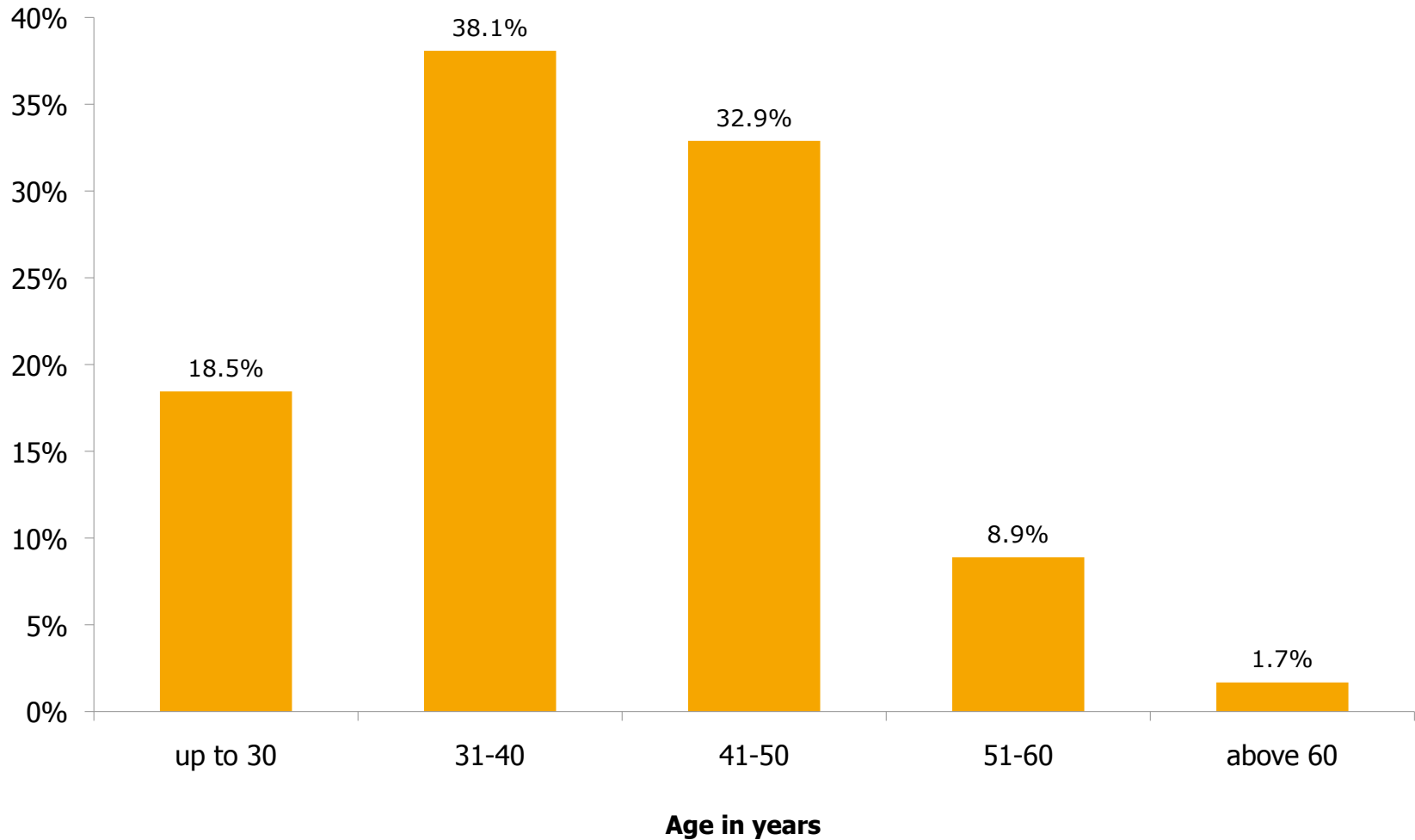
(596 COMMUNICATIONS PROFESSIONALS)

Position	
Head of PR / corporate communications	29.9%
PR-Manager / Spokesperson	49.3%
Social media manager	9.4%
Trainee	2.2%
Other	9.2%

Organization	
Employed in the PR / communication department of a	
▪ joint-stock company	19.3%
▪ private company	42.6%
▪ governmental institution or association	25.8%
▪ non-profit organization	12.2%

Age	
Average age (years)	39

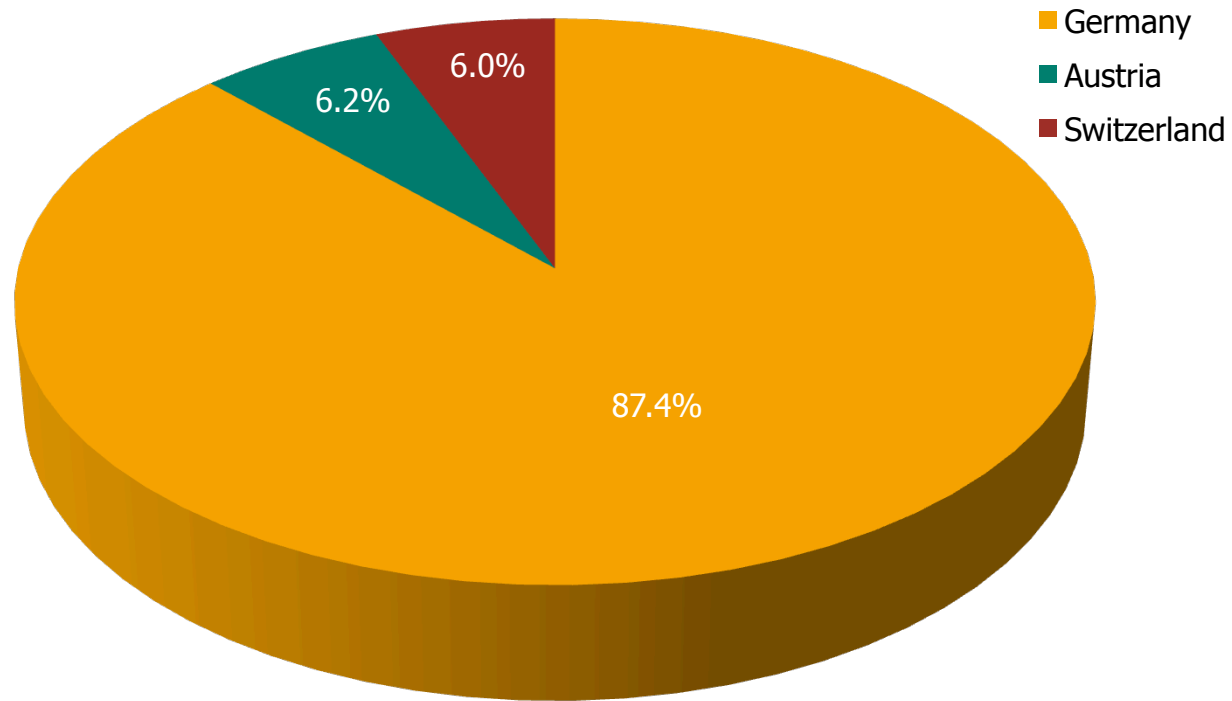
AGE DISTRIBUTION OF RESPONDENTS



SIZE OF SURVEYED ORGANIZATIONS

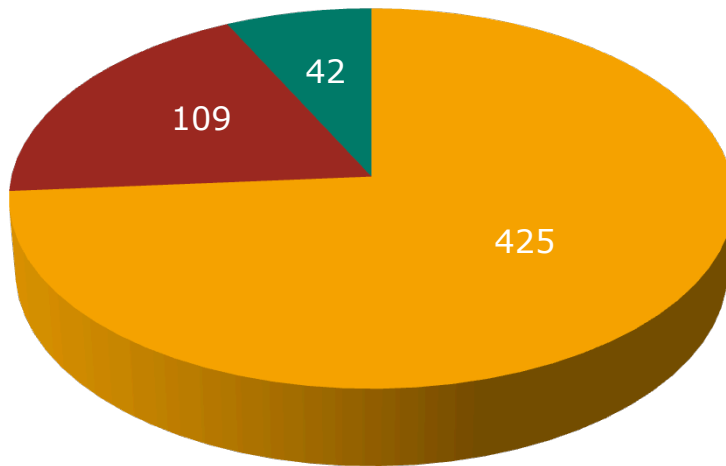
	< 50 employees	50 to 250 employees	250 to 1.000 employees	> 1.000 employees
Joint-stock company	0.8%	1.5%	2.3%	14.6%
Private company	6.5%	10.2%	9.9%	15.9%
Governmental institution or association	7.0%	6.5%	7.0%	5.2%
Non-profit organization	3.9%	3.5%	2.0%	2.9%
Total	18%	22%	21%	39%

RESPONDENTS' HOME COUNTRIES



COMPOSITION OF THE SAMPLE AND STRUCTURE OF THE QUESTIONNAIRE

The participants of the survey can be divided into three groups. Filters in the questionnaire ensured that parts concerning the use of social media etc. were only answered by those affected by the relevant issue. All results were calculated for the overall sample.



Σ = 596 respondents

■ Social media currently applied

- Part I: Online experience of the organization, demographics
- Part II: Use of social media, strategies, tools
- Part III: Responsibilities in the PR department
- Part IV: Expertise levels, use and assessment of social media

■ Social media planned

- Part I: Online experience of the organization, demographics
- Part II: Use of social media, strategies, tools
- Part IV: Expertise levels, use and assessment of social media

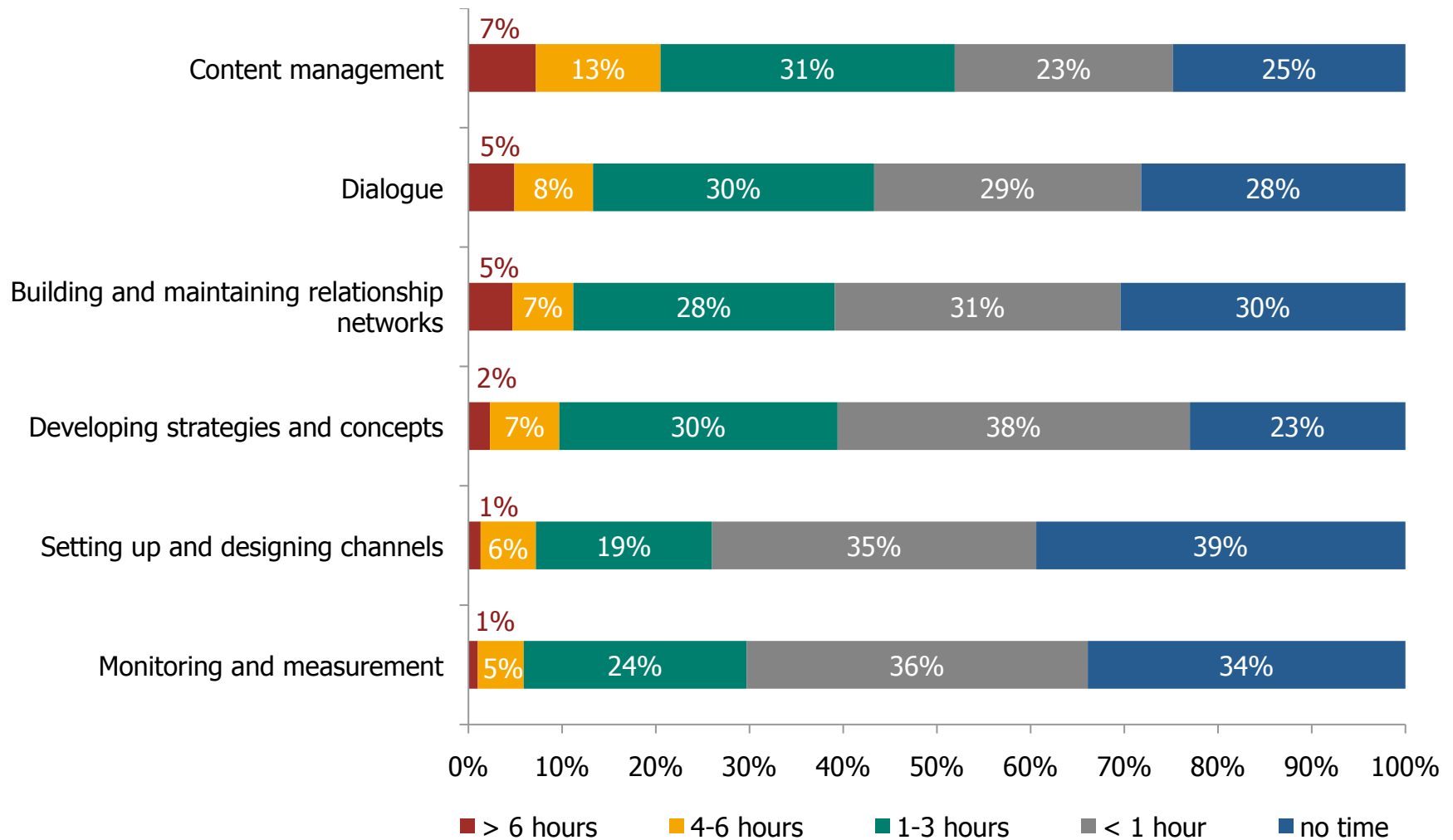
■ Social media neither applied nor planned

- Part I: Online experience of the organization, demographics
- Part IV: Expertise levels, use and assessment of social media

III. Social media in
the daily work of
communication
managers

SOCIAL MEDIA IN THE DAILY WORK OF COMMUNICATION MANAGERS

FOCUS ON CONTENTS, WHILE EVALUATION IS ONLY APPLIED IN A LIMITED WAY



THE WORK LOAD OF COMMUNICATION MANAGERS HAS INCREASED

SOCIAL MEDIA REQUIRE ADDITIONAL EFFORTS



HOW THE DAILY WORK OF COMMUNICATION PROFESSIONALS HAS BEEN CHANGED BY SOCIAL MEDIA

	Agree	Not sure	Disagree
The daily work pressure increases	62.6%	19.6%	17.8%
I feel obligated to be "always on"	46.5%	29.0%	24.5%
The associated extra work cannot be accomplished	30.6%	34.7%	34.7%
Social media are integrated into other tasks and there are synergies, little additional time is needed	21.0%	25.1%	53.9%
I have completely delegated the topic and my job is limited to strategic management tasks	15.4%	11.6%	73.0%
The topic has no effect at all on my daily work	13.1%	13.2%	73.7%
Social media have substituted other tasks	11.9%	21.0%	67.1%

COMMUNICATION MANAGERS WITH HIGHER SOCIAL MEDIA EXPERTISE COMPLAIN ABOUT ADDITIONAL EFFORTS TO A LESSER EXTENT

	Social media expertise index (skills and experiences of communicators)		
	Low	Average	High
The associated extra work cannot be accomplished	3.15	2.98	2.54
Social media are integrated into other tasks and there are synergies, little additional time is needed	2.17	2.51	2.68
Social media have substituted other tasks	1.96	2.05	2.32
The topic has no effect at all on my daily work	2.12	1.80	1.85
I have completely delegated the topic and my job is limited to strategic management tasks	2.12	1.82	1.90

SOCIAL MEDIA ARE CONSIDERED TO BE LESS OF AN EFFORT AND MORE INTEGRATIVE WHEN AN EXPLICIT REGULATORY FRAMEWORK EXISTS

	Social Media Governance index (regulatory frameworks for social media)		
	Weak	Average	Strong
The associated extra work cannot be accomplished	3.12	2.59	2.17
Social media are integrated into other tasks and there are synergies, little additional time is needed	2.28	2.83	2.86
Social media have substituted other tasks	1.99	2.24	2.50
I have completely delegated the topic and my job is limited to strategic management tasks	1.87	1.98	2.40

LARGE ORGANIZATIONS AND NON-PROFITS TEND TO SUBSTITUTE OTHER TASKS WITH SOCIAL MEDIA, SMALLER ORGANIZATIONS USE SYNERGIES QUITE WELL

	Social media have substituted other tasks		Social media have substituted other tasks	Social media are integrated (synergies)
Joint-stock company	1.97	< 50 employees	1.66	2.79
Private company	2.20	50–250 employees	1.82	2.38
Governmental institution or association	1.89	250–1.000 employees	1.85	2.30
Non-profit organization	2.29	> 1.000 employees	2.17	2.39

Substitution and synergies increase with experience and the feeling of being prepared.

ASSESSMENT OF SOCIAL MEDIA BY COMMUNICATION PROFESSIONALS

HIGH EFFORT, LOSS OF CONTROL AND LACK OF CONCEPTS ARE MAIN OBSTACLES



76.0%

too much effort required (financial/personnel)



54.9%

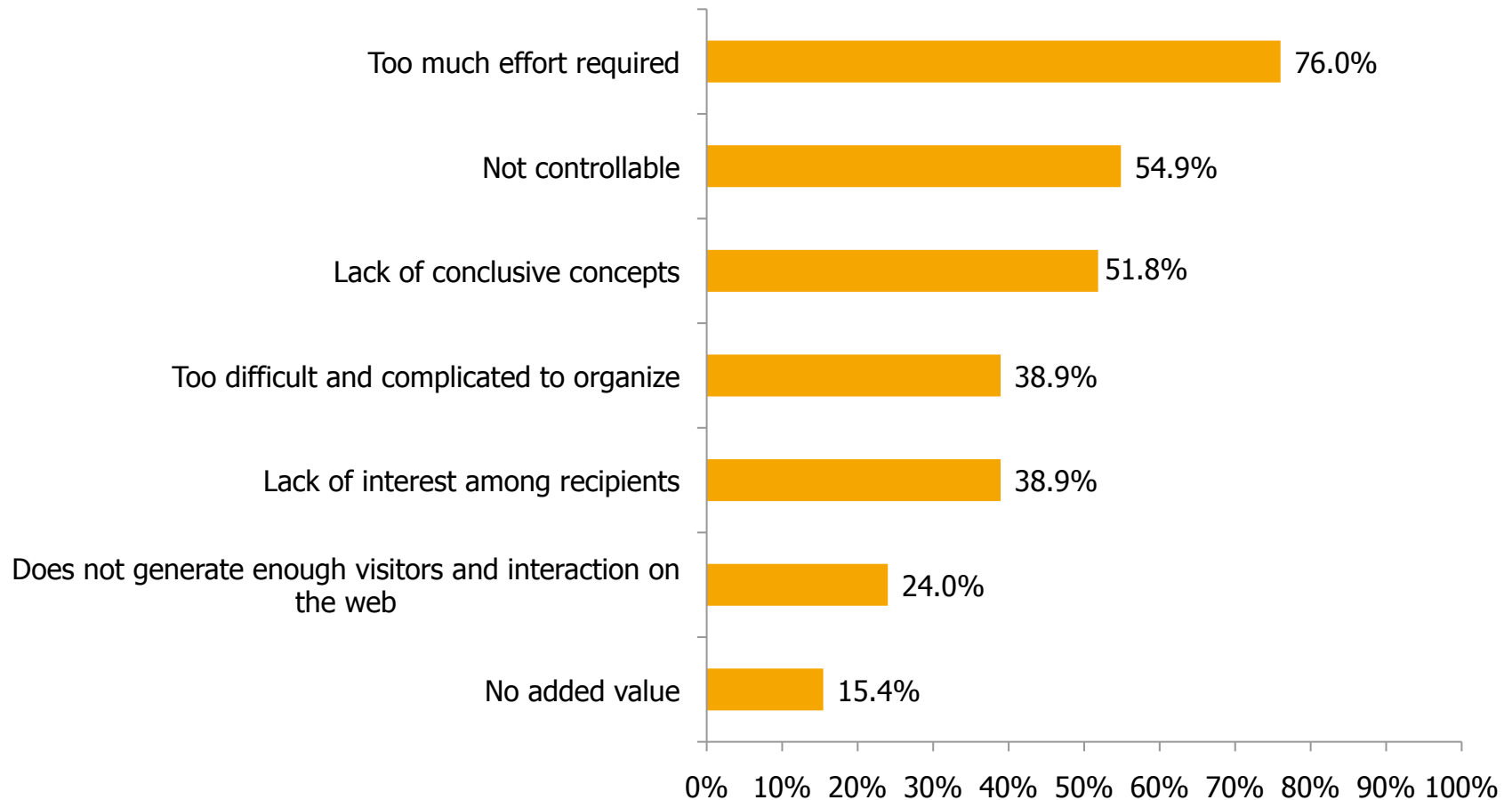
not controllable



51.9%

lack of conclusive concepts

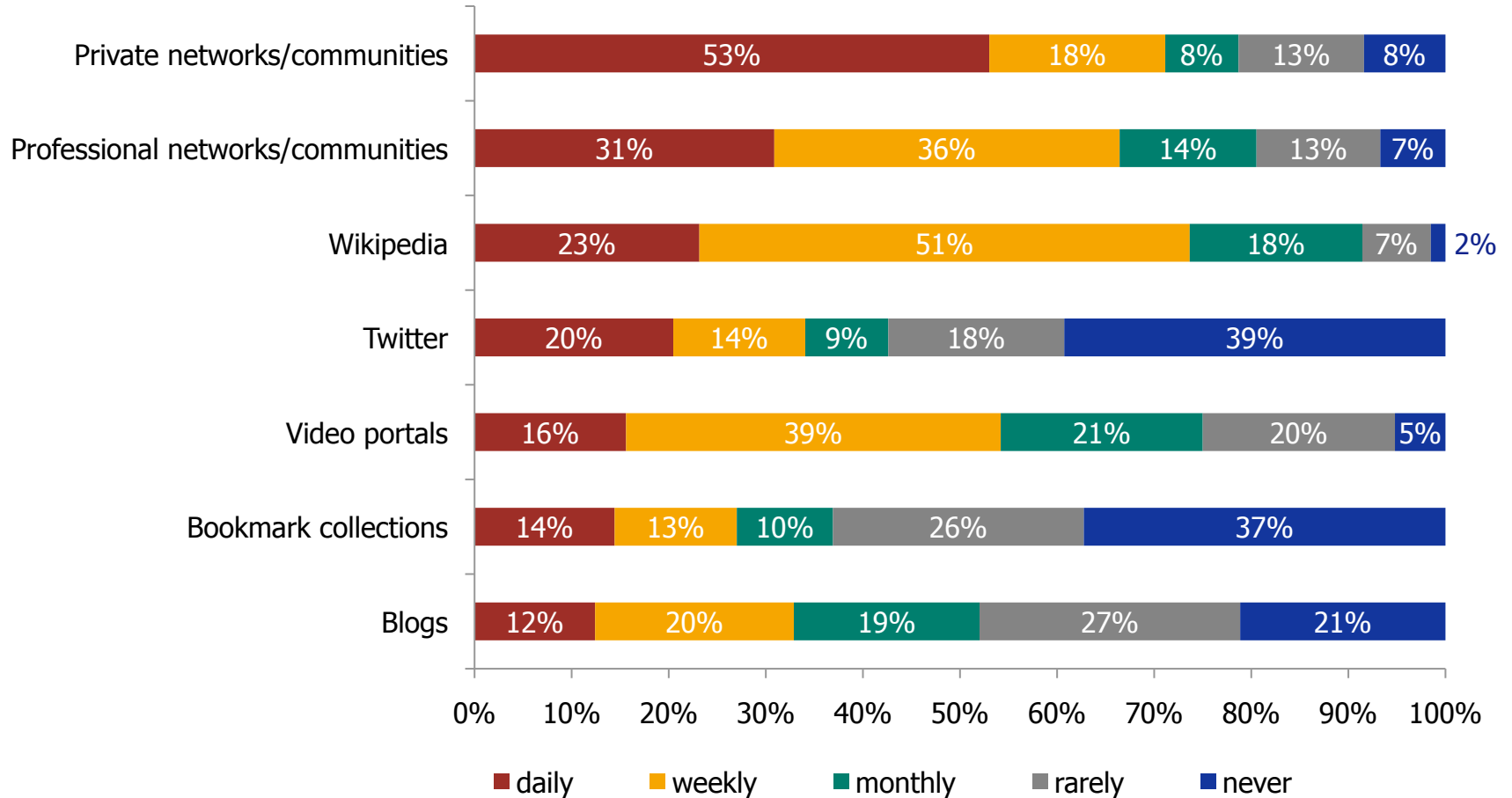
SOCIAL MEDIA APPLICATION OBSTACLES IN DETAIL



IV. Expertise Levels and use of social media at the workplace

SOCIAL MEDIA USE BY COMMUNICATION PROFESSIONALS

SOCIAL NETWORKS AND WIKIPEDIA ARE THE MOST WIDELY USED



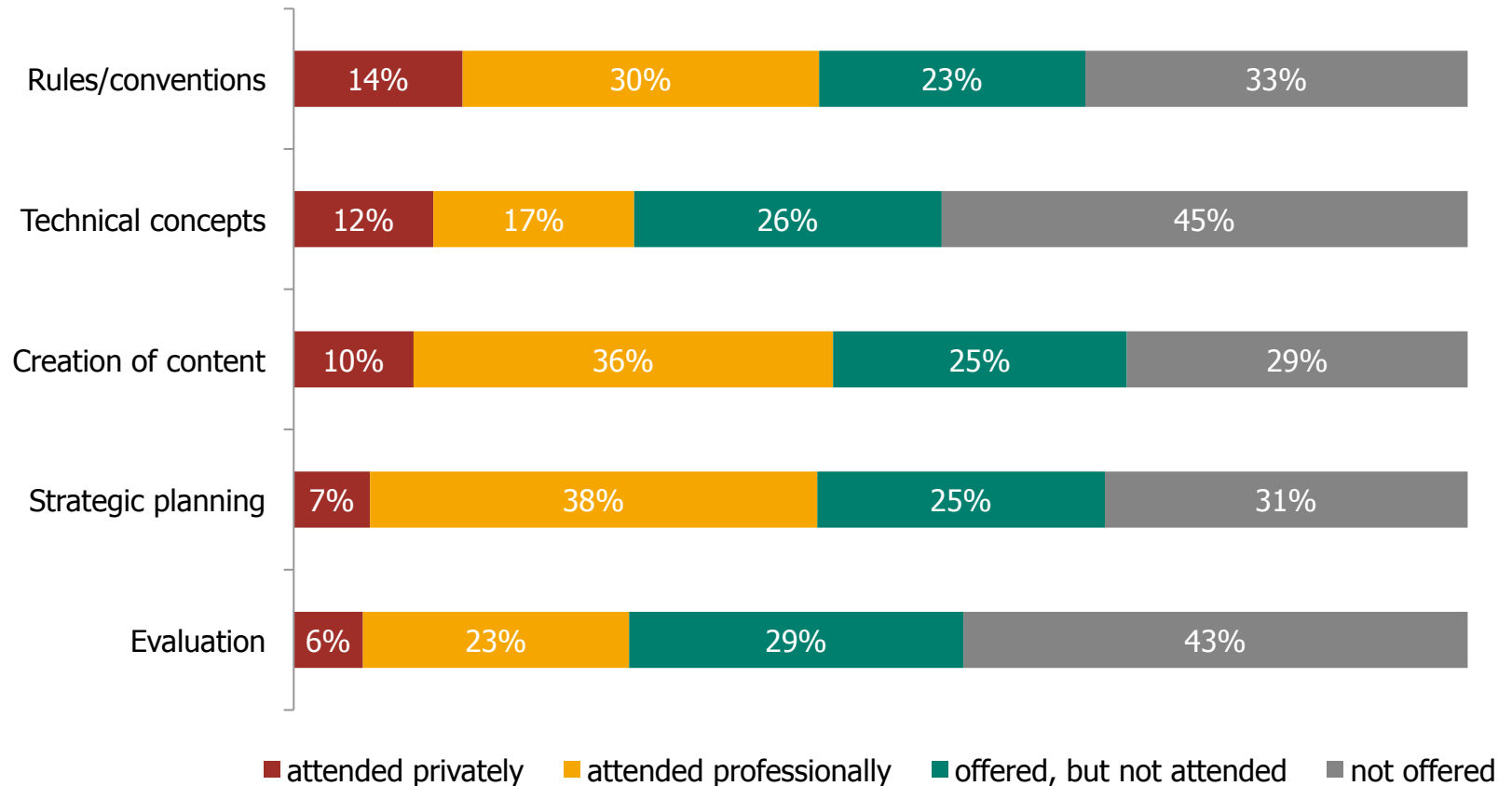
COMMUNICATION PROFESSIONALS USE SOCIAL MEDIA MORE EXTENSIVELY THAN THE POPULATION AVERAGE IN GERMANY

	Frequently		Sporadically		Never	
	Communi- cators	General population	Communi- cators	General population	Communi- cators	General population
Private networks/communities	71%	35%	21%	6%	8%	58%
Professional networks/communities	66%	3%	27%	4%	7%	94%
Wikipedia	74%	29%	25%	41%	1%	30%
Twitter	34%	1%	27%	2%	39%	97%
Video portals	54%	31%	41%	26%	5%	42%
Blogs	33%	2%	46%	6%	21%	93%

TRAINING OF COMMUNICATION PROFESSIONALS IN THE AREA OF SOCIAL MEDIA

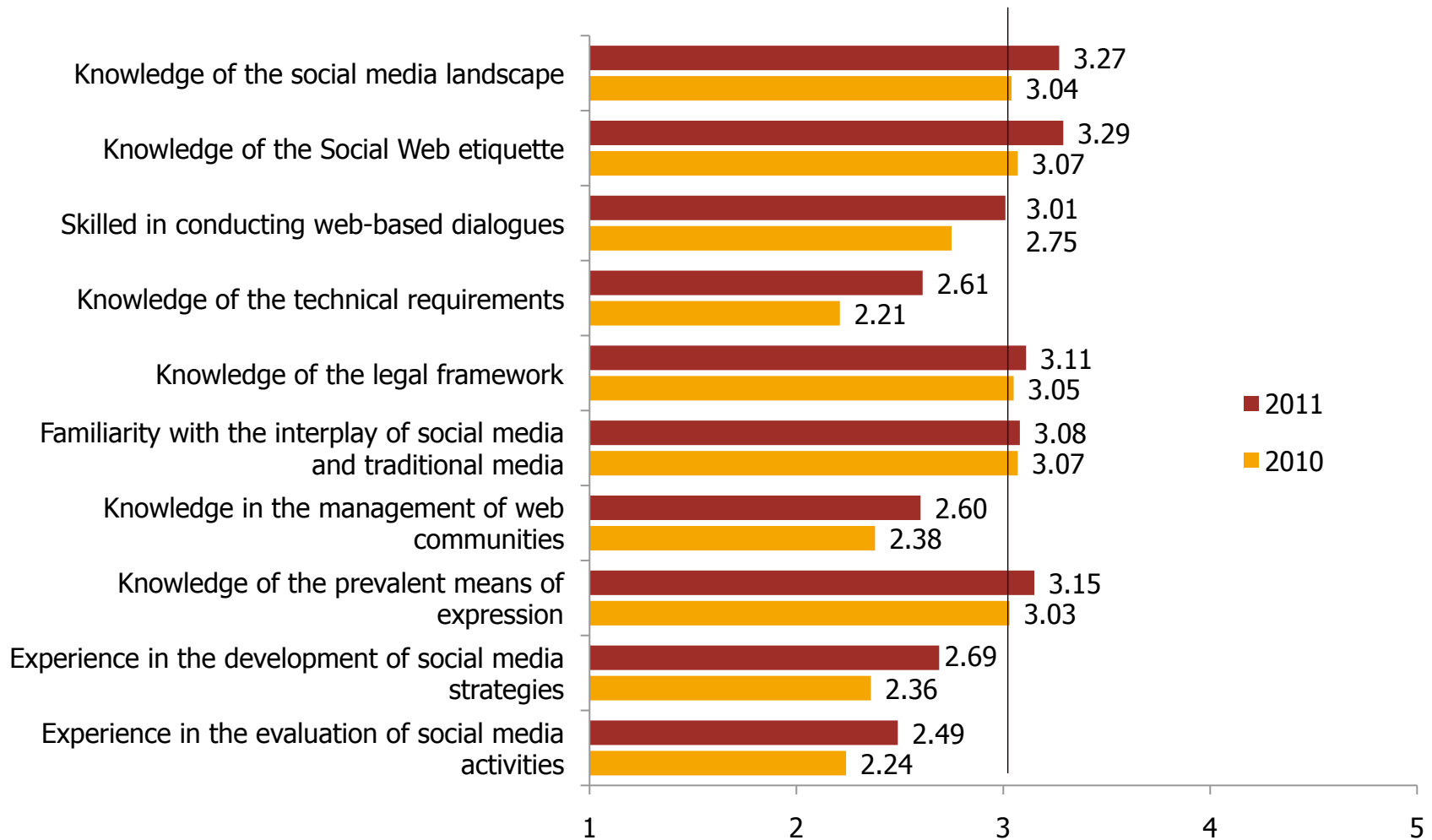
ONE IN THREE ARE ALREADY HIGHLY QUALIFIED, BUT MANY TOPICS LACK TRAINING OFFERS

Attended training courses dealing with:

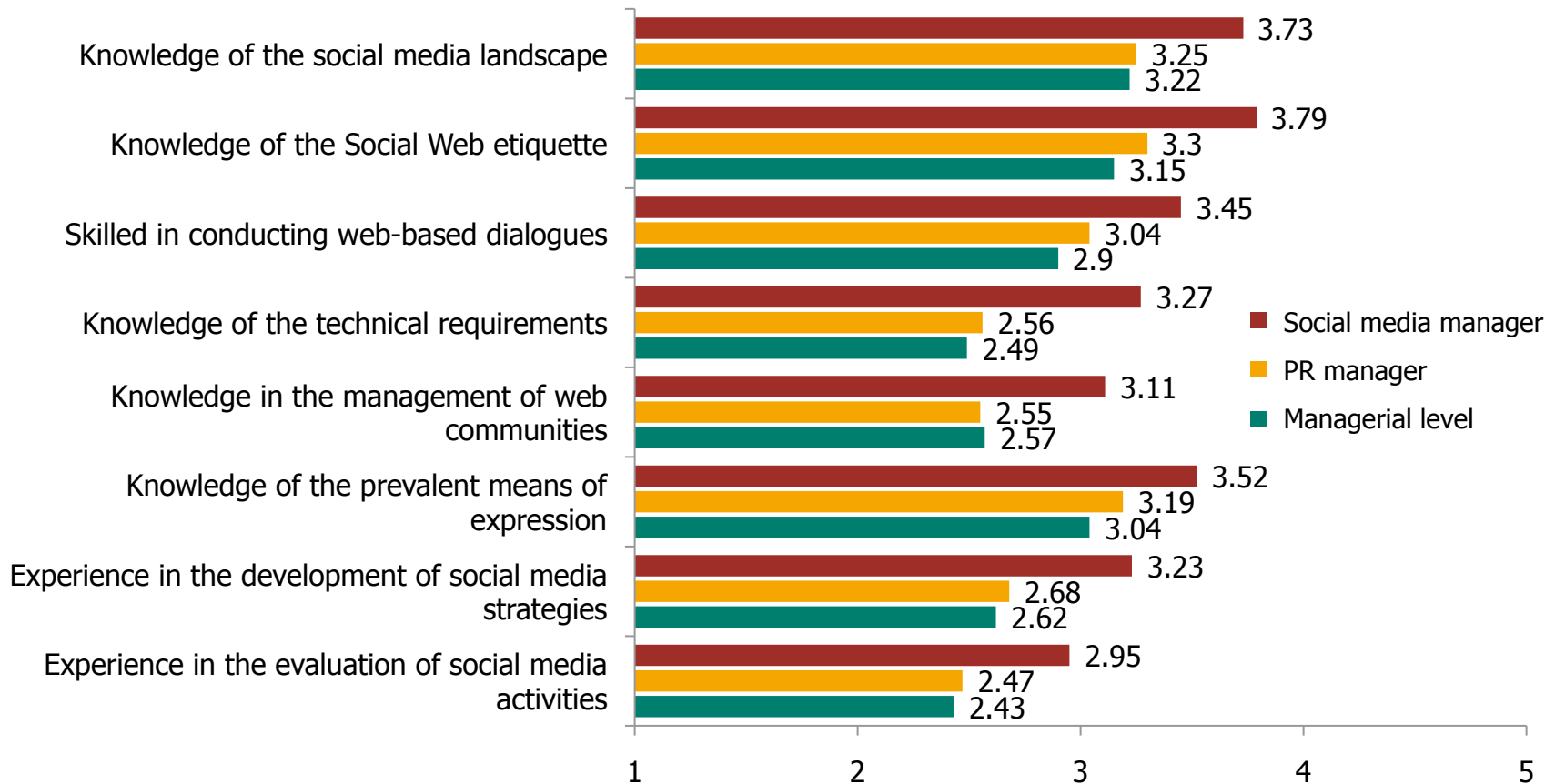


SOCIAL MEDIA EXPERTISE OF COMMUNICATION PROFESSIONALS

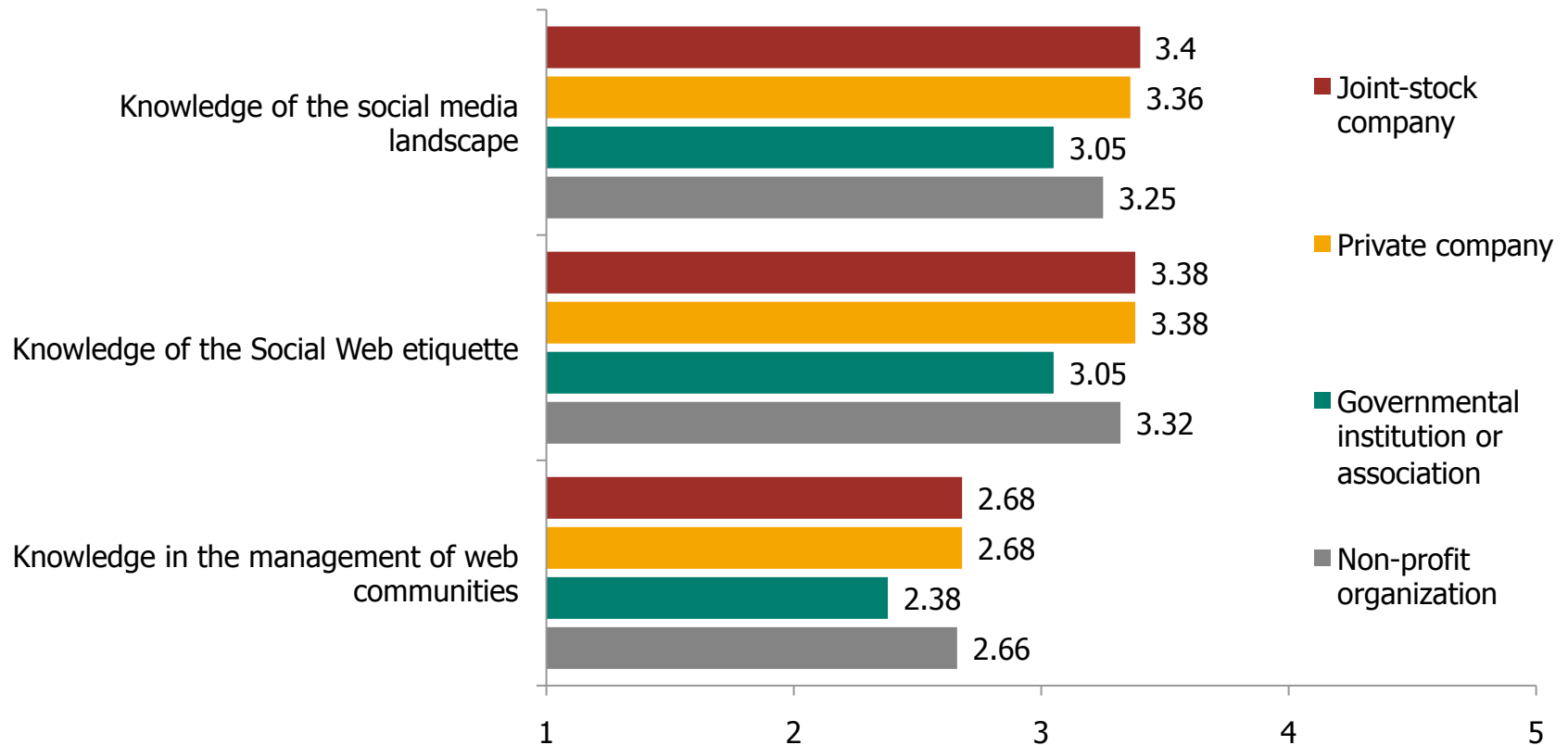
ONLY AVERAGE OVERALL SKILLS, BUT IMPROVEMENT OVER LAST YEAR



SOCIAL MEDIA MANAGERS HAVE SIGNIFICANTLY MORE SKILLS COMPARED TO OTHER COMMUNICATIONS EXPERTS



THE SOCIAL MEDIA SKILL LEVEL IS SIGNIFICANTLY LOWER IN GOVERNMENTAL INSTITUTIONS, POLITICAL ORGANIZATIONS AND ASSOCIATIONS



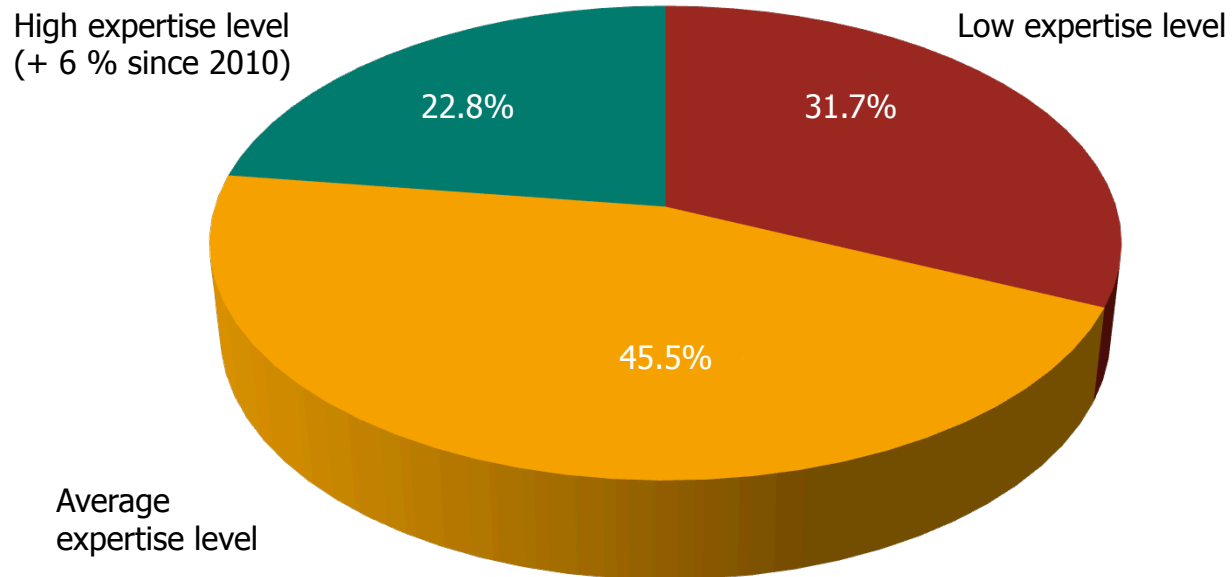
EXPERIENCE AND KNOW-HOW OF ORGANIZATIONS CORRELATE WITH THE SOCIAL MEDIA EXPERTISE OF THE COMMUNICATION MANAGER

	Social media experience of the organization	Social media know-how of the organisation
Experience of the communication manager in the evaluation of social media activities	0.29	0.30
Knowledge in the management of web communities	0.28	0.27
Experience of the communication managers in the development of social media strategies	0.27	0.29

The longer an organization has been applying social media and the better it is prepared, the higher the communications managers assess their own skills.

INDEX OF SOCIAL MEDIA SKILLS

LESS THAN ONE OUT OF FOUR COMMUNICATION MANAGERS HAS A HIGH EXPERTISE LEVEL



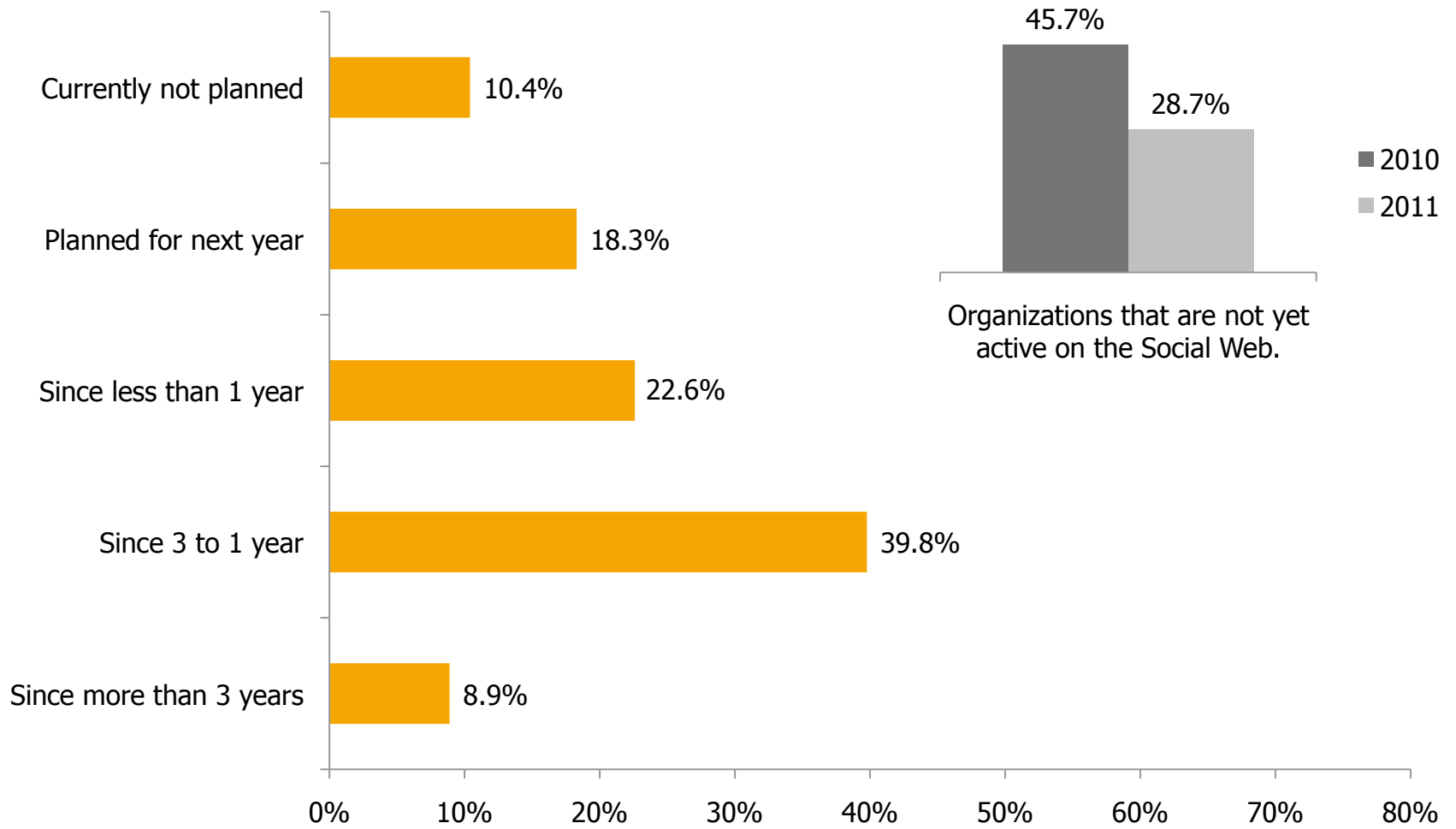
The index of social media skills I_{SMK} was calculated for every participant of the survey as the average rating of ten individual skills in the questionnaire. The index values range from 0 (no experience) to 5 (professional).

Low skill level: $0 \leq I_{SMK} < 2.5$; medium skill level: $2.5 \leq I_{SMK} \leq 3.5$; high skill level: $3.5 < I_{SMK} \leq 5$.

V. Social media
activities: tools,
networks and
applications

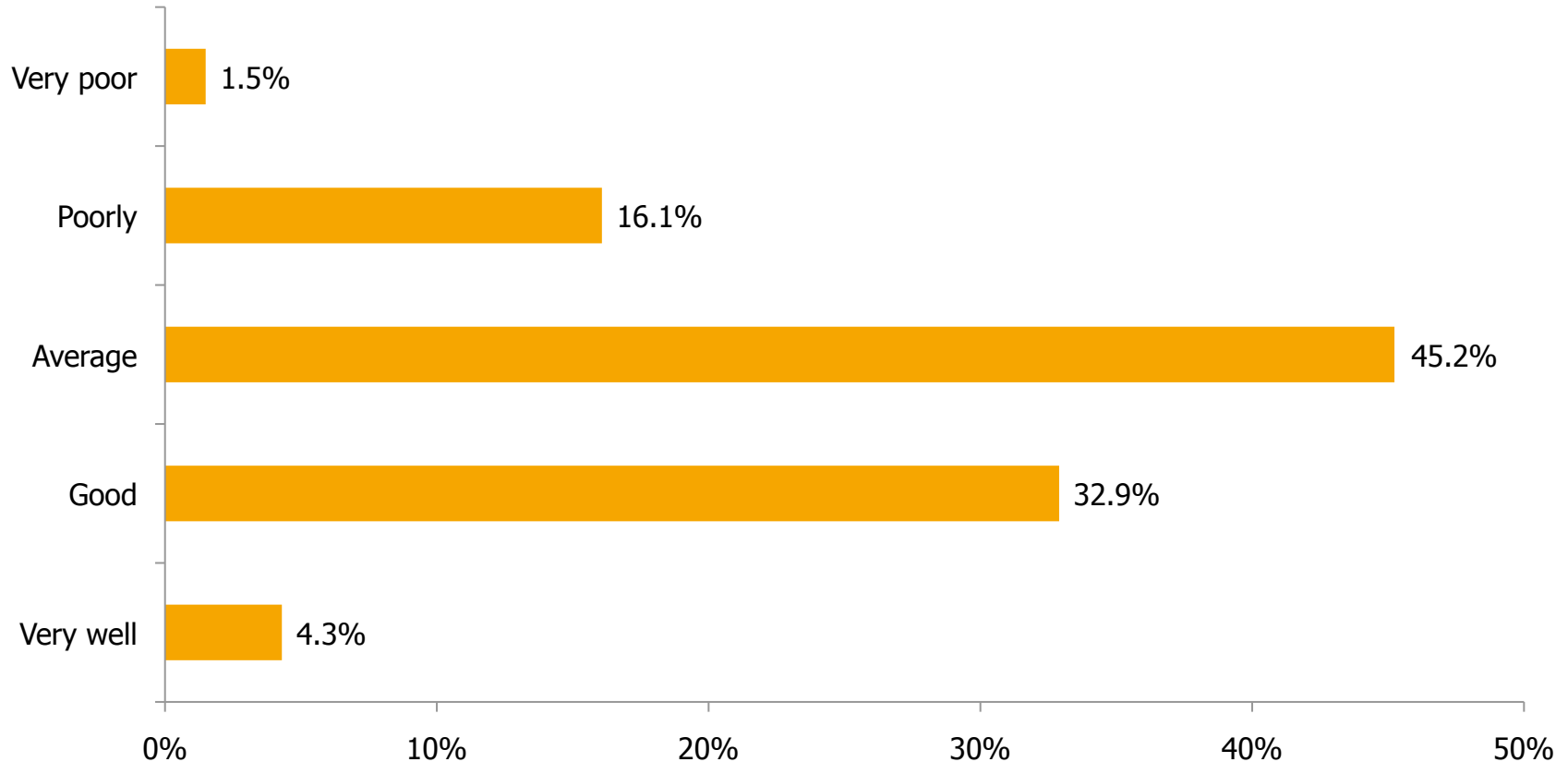
SOCIAL MEDIA COMMUNICATION

THREE IN TEN SURVEYED ORGANIZATIONS ARE NOT ACTIVE ON THE SOCIAL WEB UNTIL NOW



SOCIAL MEDIA KNOW-HOW OF ORGANIZATIONS

ONLY ONE IN THREE IS WELL-PREPARED FOR SOCIAL MEDIA COMMUNICATION



SOCIAL MEDIA EXPERIENCE IN DIFFERENT ORGANIZATIONS

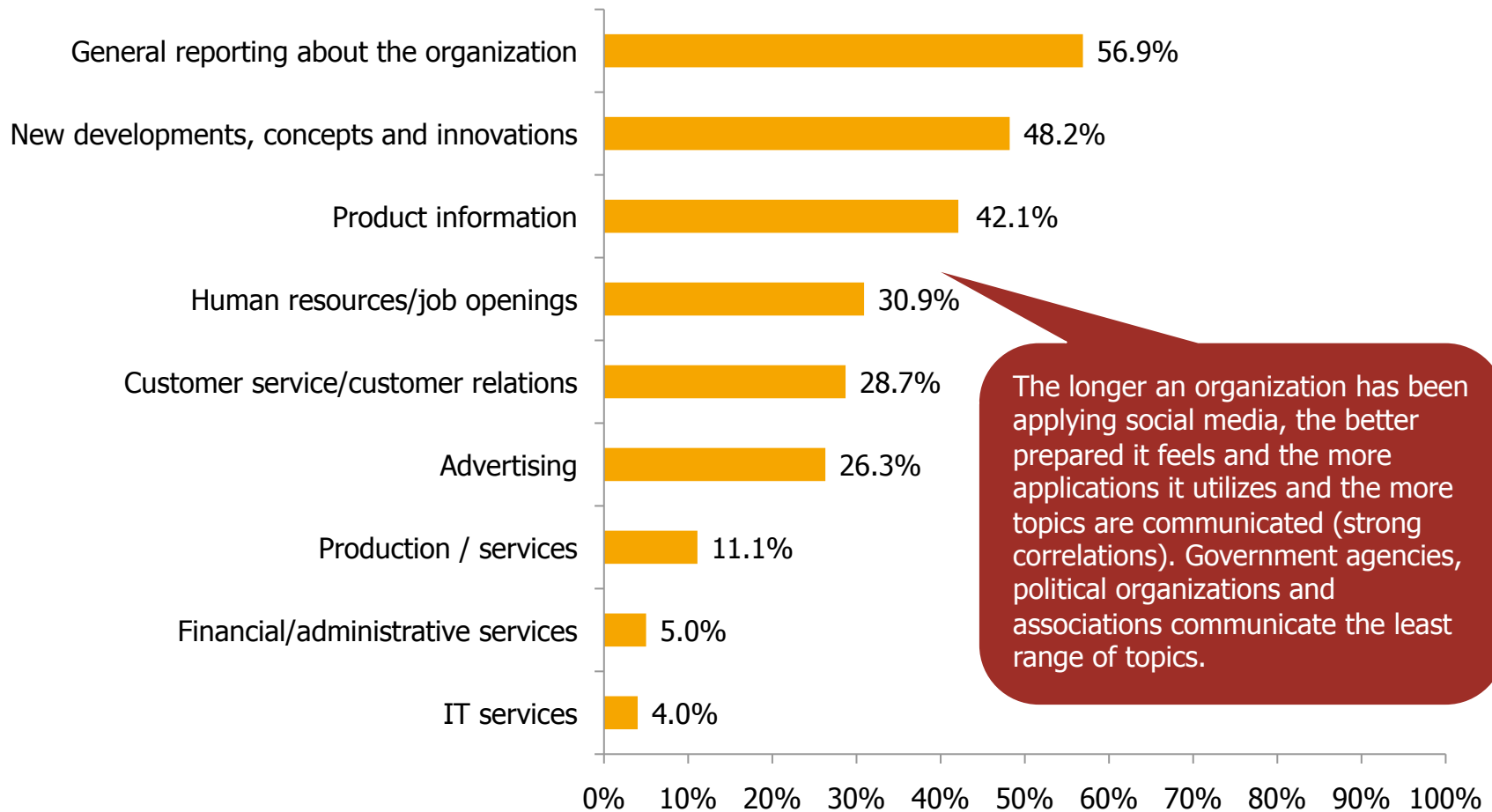
JOINT STOCK COMPANIES AND NON-PROFITS HAVE BEEN ACTIVE FOR THE LONGEST TIME

	No experience (*)	Little experience (<1 year)	Some experience (1 to 3 years)	Large degree of experience (>3 years)
Joint-stock company	20.0%	13.9%	52.2%	13.9%
Private company	26.4%	24.8%	39.8%	9.1%
Governmental institution or association	41.6%	24.0%	30.5%	3.9%
Non-profit organization	23.3%	26.0%	39.7%	11.0%

* Currently not planned; planned for next year.

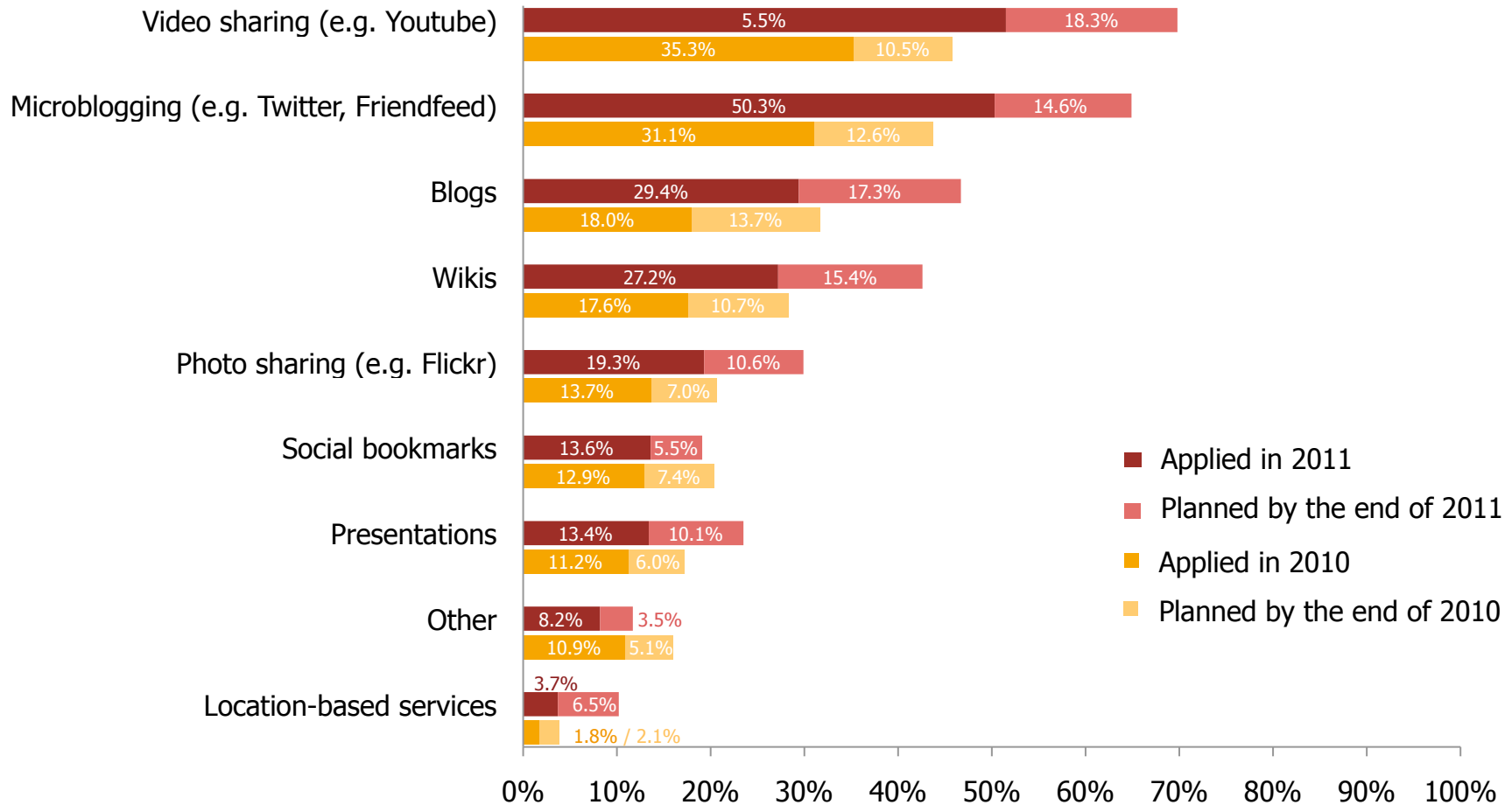
CONTENTS OF SOCIAL MEDIA COMMUNICATION

GENERAL REPORTING, INNOVATION AND PRODUCT-RELATED TOPICS TOP THE LIST

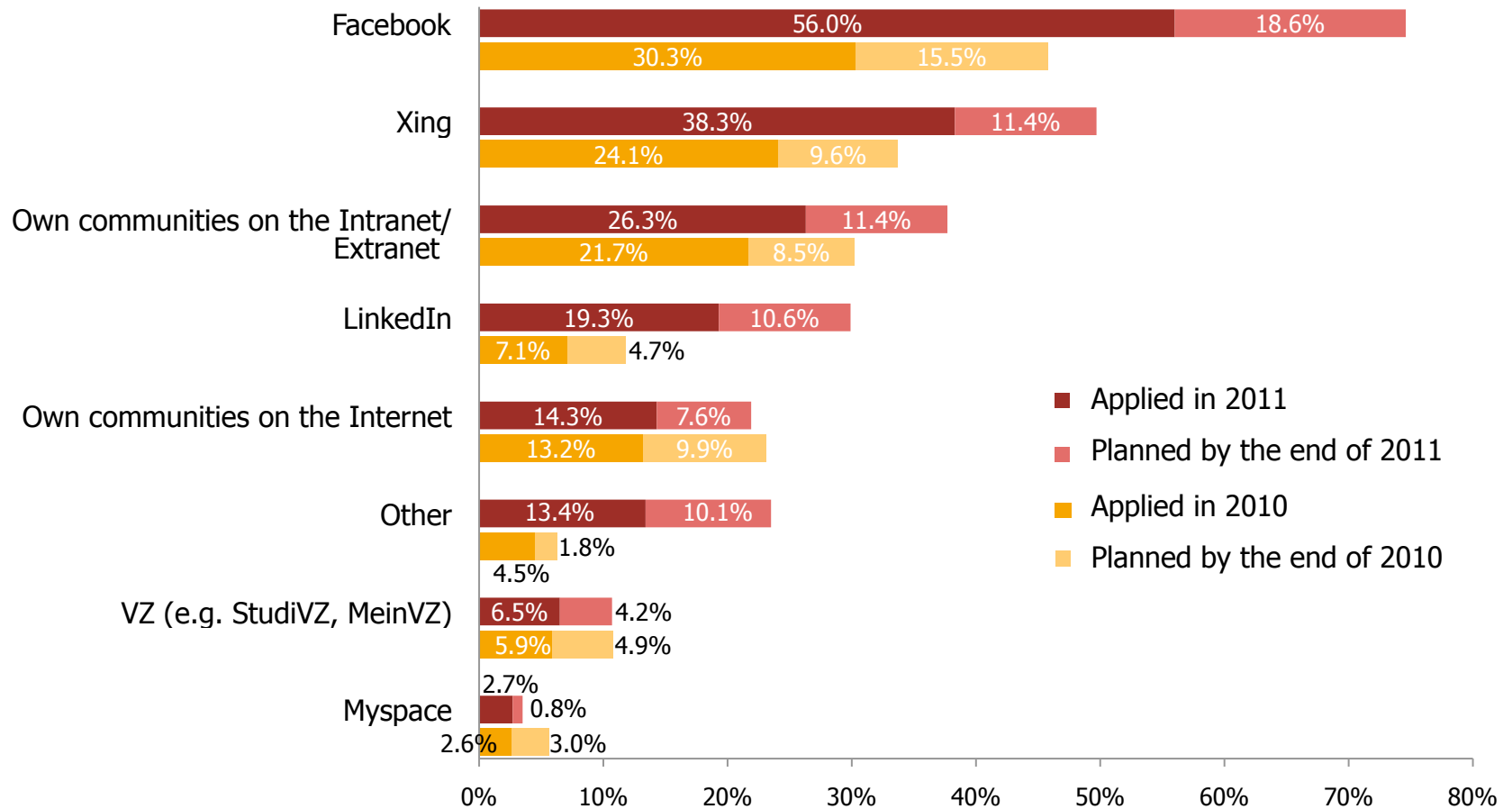


SOCIAL MEDIA TOOLS IN COMMUNICATION DEPARTMENTS

VIDEO SHARING, MICROBLOGGING AND BLOGS ARE MOST FREQUENTLY USED

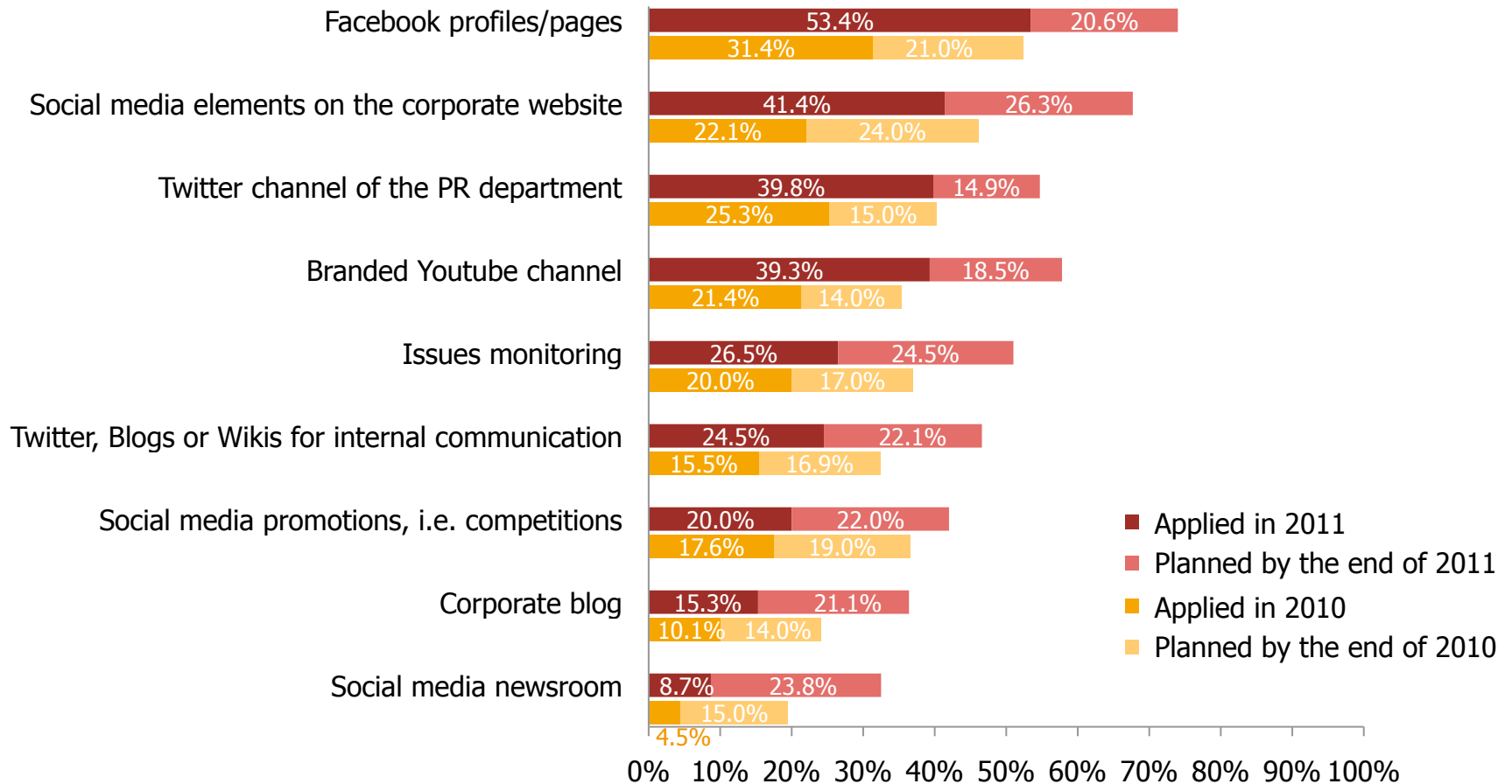


SOCIAL NETWORKS: TARGETED MEASURES ARE PRIMARILY APPLIED IN FACEBOOK, WHILE XING AND OWN COMMUNITIES ARE ALSO RELEVANT

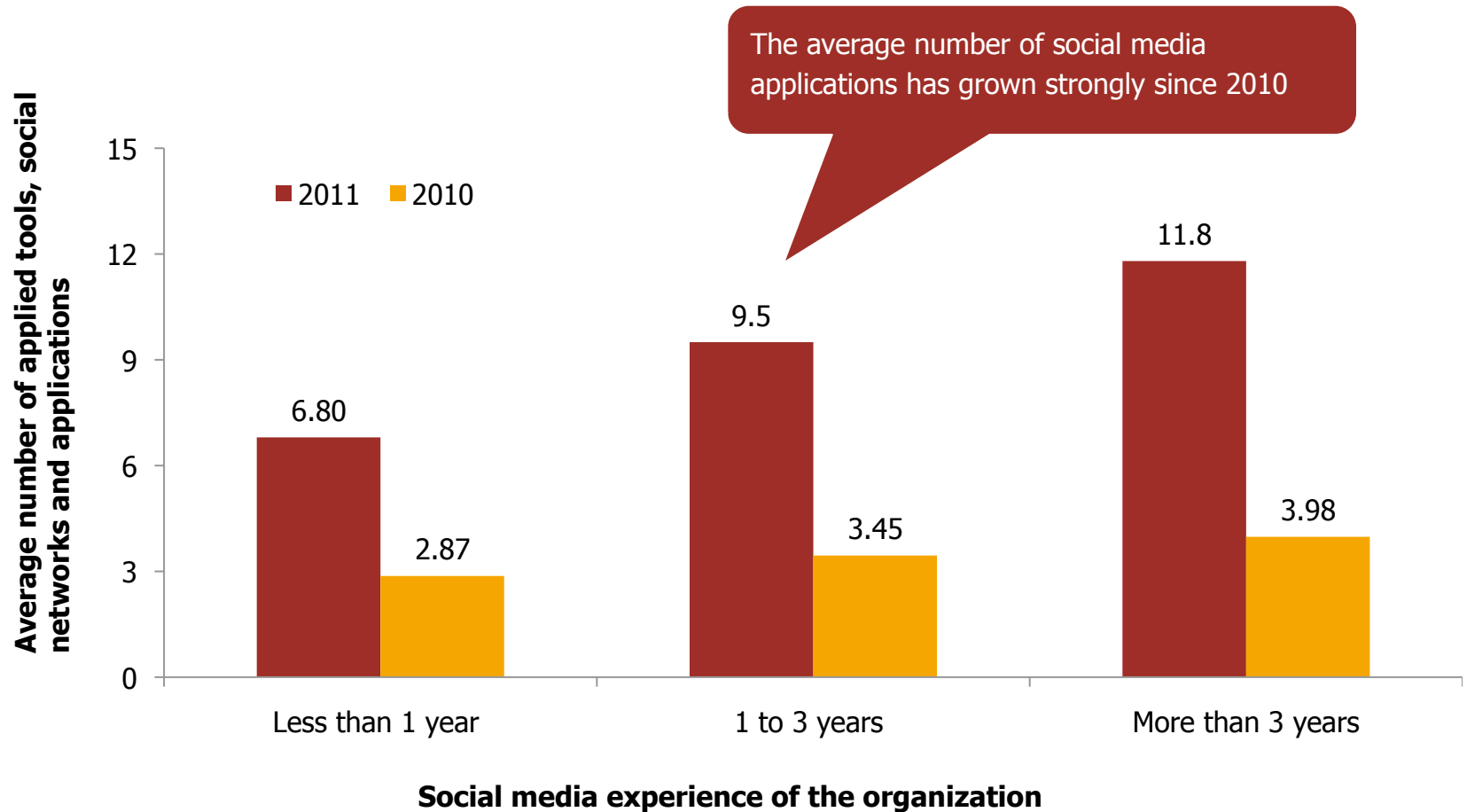


SOCIAL MEDIA APPLICATIONS IN PUBLIC RELATIONS

FACEBOOK DOMINATES, NEWSROOMS HAVE GROWN BELOW PLAN

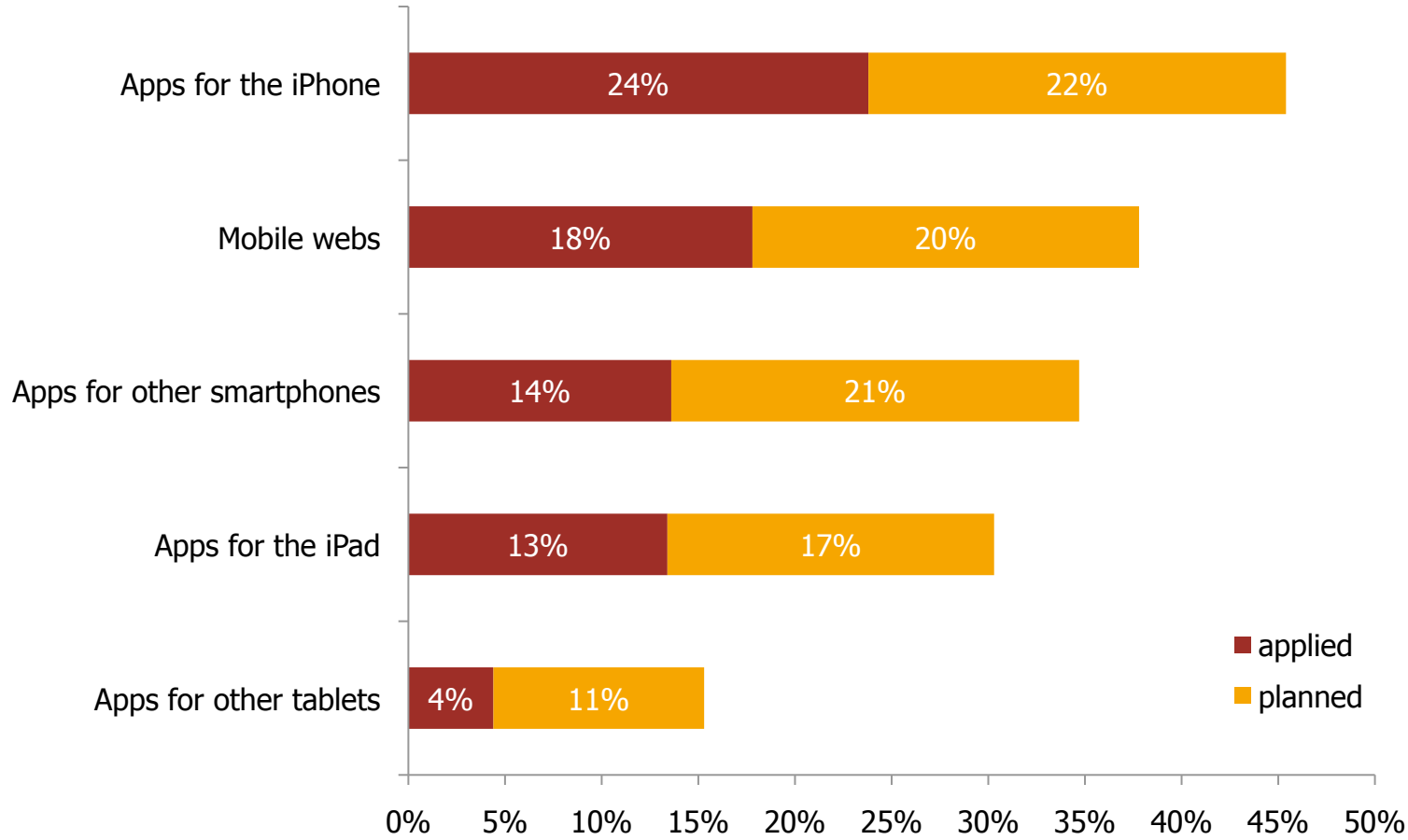


GREATER SOCIAL MEDIA EXPERIENCE INCREASES THE NUMBER OF USED SOCIAL MEDIA APPLICATIONS



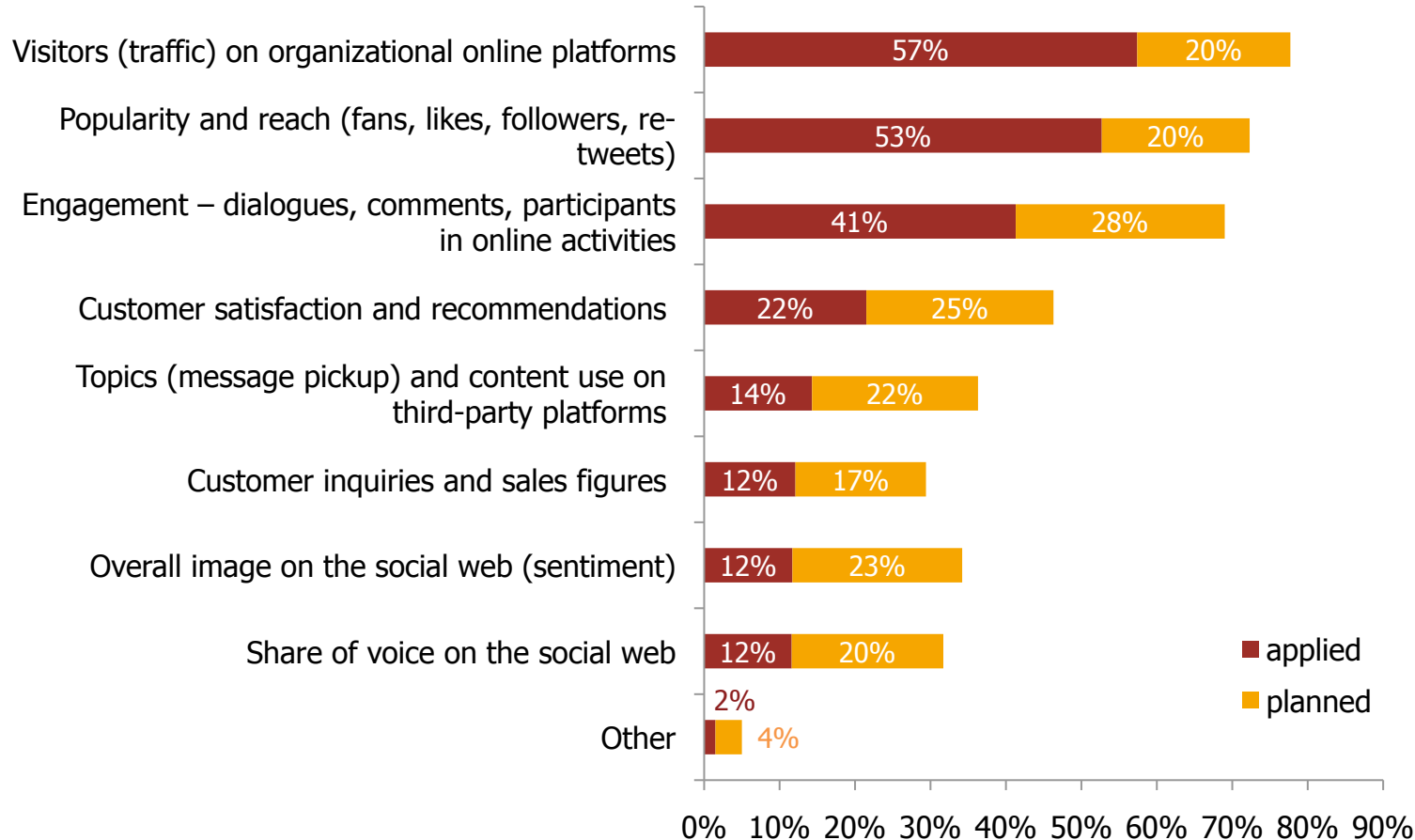
MOBILE INTERNET APPLICATIONS ARE STILL VERY LIMITED IN SCOPE

HOWEVER, ALMOST HALF OF ALL ORGANIZATIONS PLAN AN IMPLEMENTATION



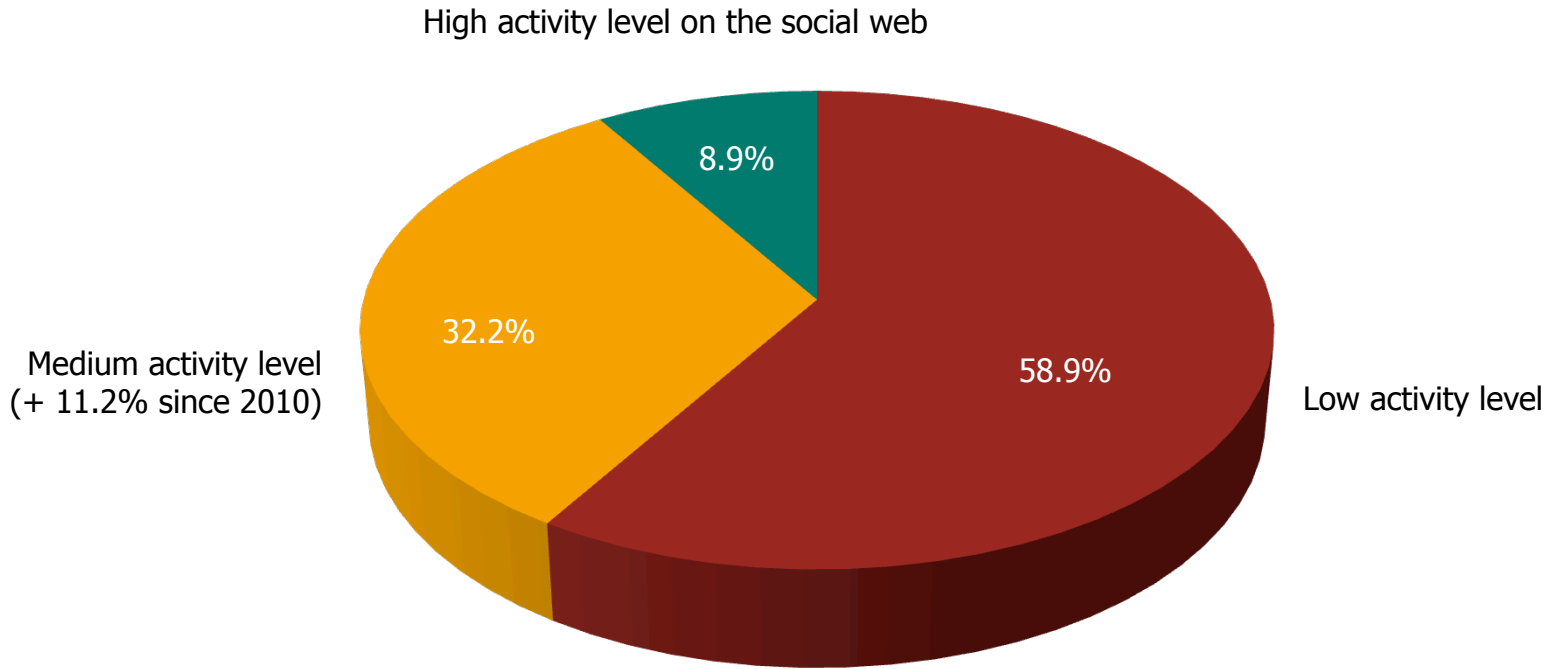
MEASURING THE SUCCESS OF SOCIAL MEDIA

TRAFFIC AND REACH ARE THE MOST IMPORTANT METRICS SO FAR



INDEX OF SOCIAL MEDIA ACTIVITIES

ONLY ONE IN TEN ORGANIZATIONS IS VERY ACTIVE ON THE SOCIAL WEB

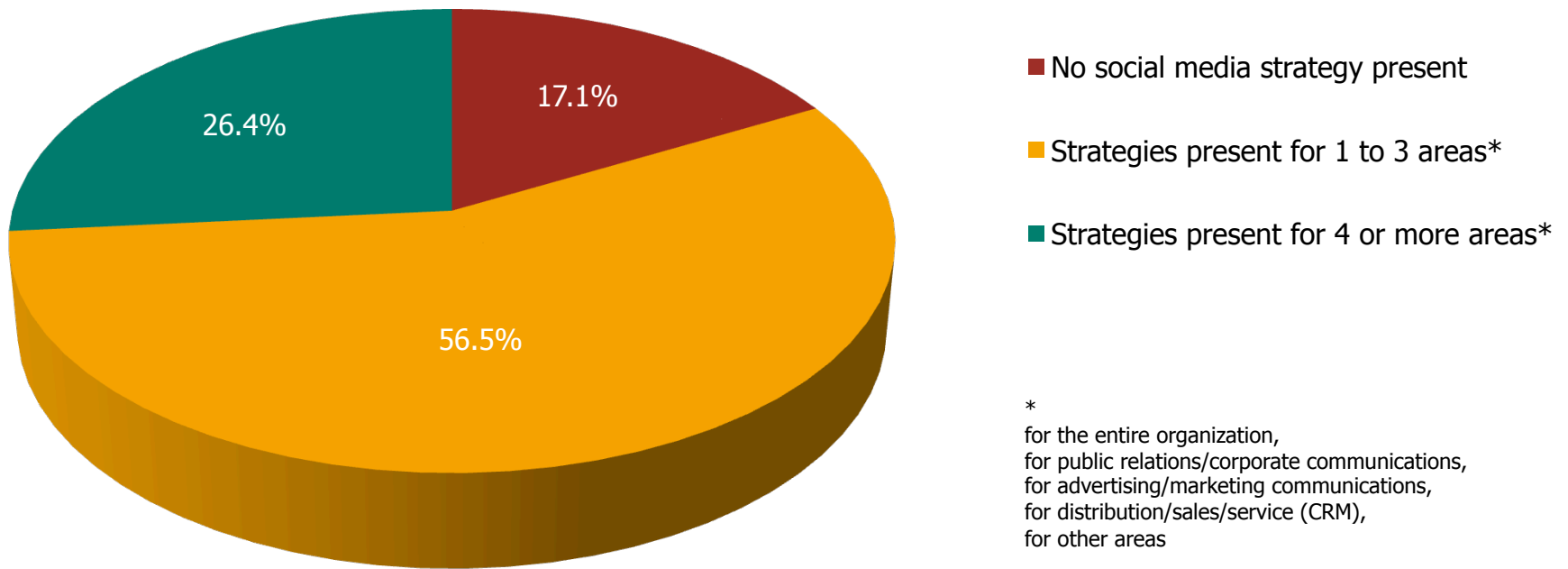


The social media index I_{SMA} was calculated as the sum of all social media tools, networks and applications applied by the PR department. The index values range from 0 to 27. Low activity: $0 \leq I_{SMA} \leq 7$ (mean value); medium activity: $7 \leq I_{SMA} \leq 14$; high activity: $14 \leq I_{SMA} \leq 27$.

VI. Strategies and
responsibilities
for social media

SPREAD AND SCOPE OF SOCIAL MEDIA STRATEGIES

17 PERCENT OF ALL ORGANIZATIONS HAVE NOT DEVELOPED ANY STRATEGY YET



WHEN SOCIAL MEDIA STRATEGIES ARE PRESENT, THEY ARE USUALLY RELATED TO COMMUNICATIONS ONLY AND RARELY TO THE ENTIRE ORGANIZATION



SOCIAL MEDIA STRATEGIES FOR DIFFERENT TYPES OF ORGANIZATIONS

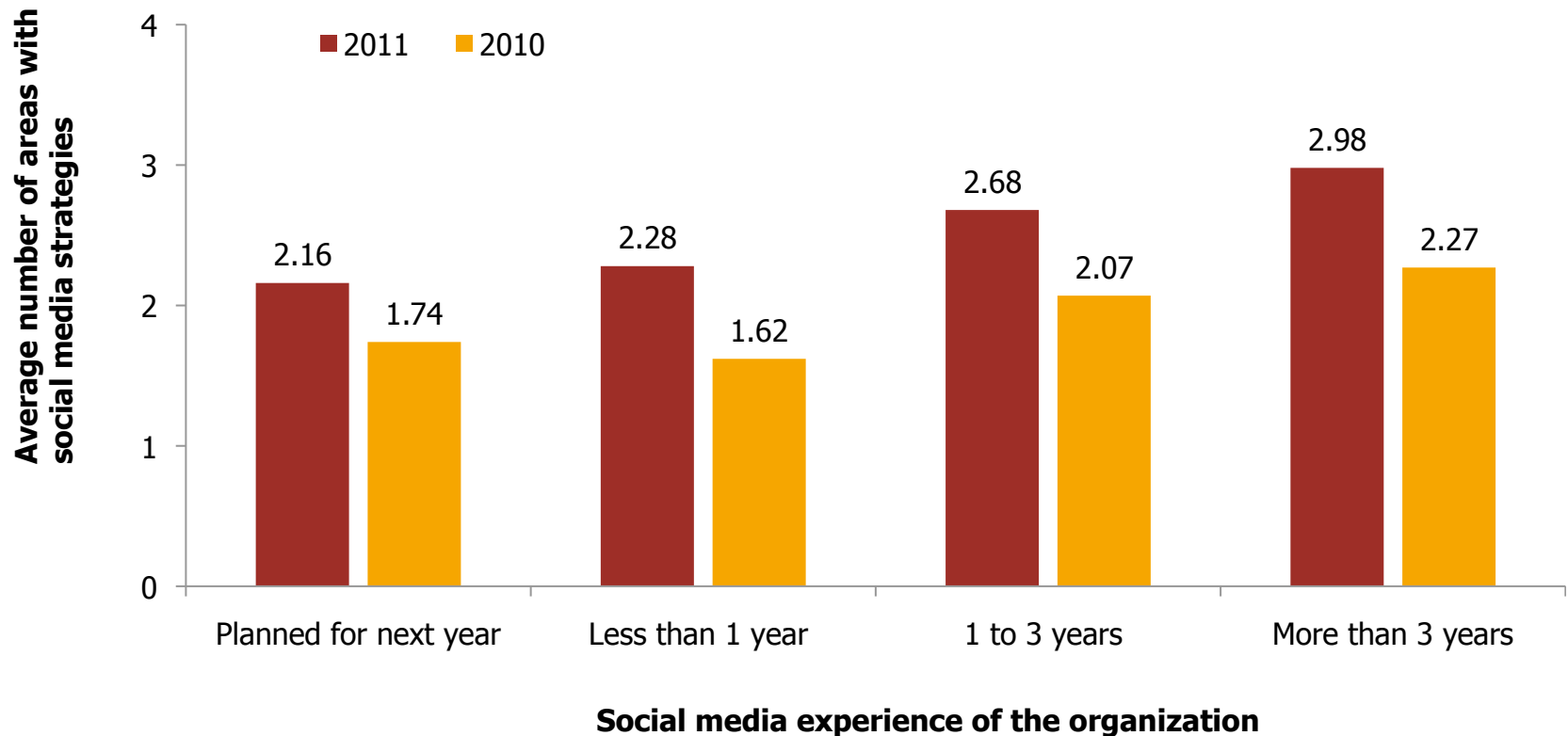
JOINT-STOCK COMPANIES AND LARGE ORGANIZATIONS LEAD THE WAY

	Areas with social media strategies (average)
Joint-stock company	3.05
Private company	2.74
Governmental institution or association	1.79
Non-profit organization	2.18

	Areas with social media strategies (average)
< 50 employees	2.08
50–250 employees	2.47
250–1.000 employees	2.17
> 1.000 employees	2.9

STRATEGY AND EXPERIENCE WITH SOCIAL MEDIA

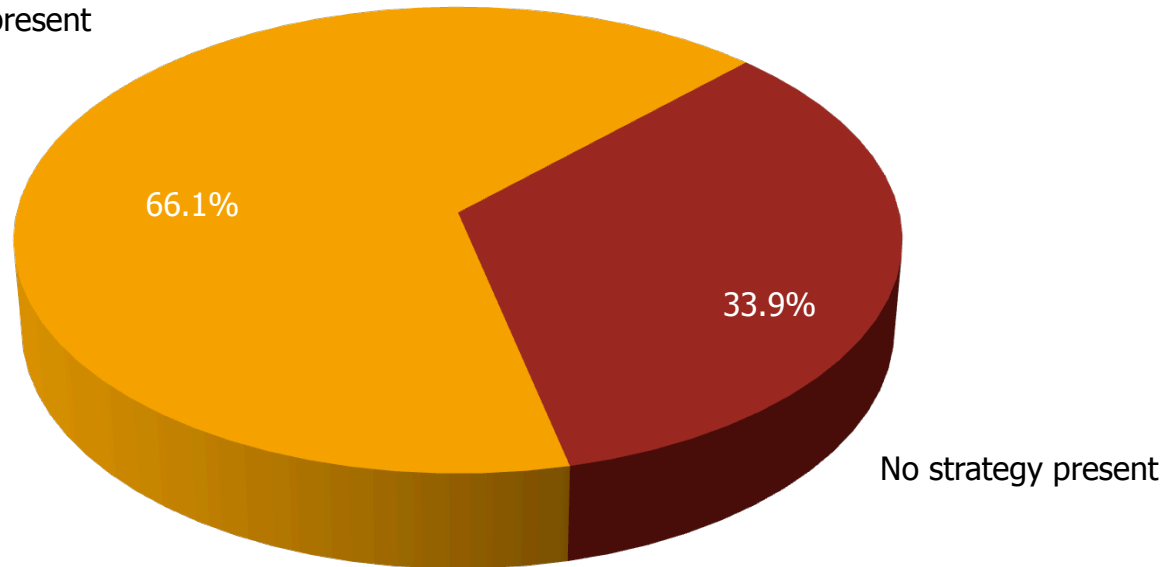
GREATER EXPERIENCE OF ORGANIZATIONS RESULTS IN THE INCORPORATION OF MORE AREAS



INDEX OF SOCIAL MEDIA STRATEGIES

TWO IN THREE ORGANIZATIONS HAVE STRATEGIES FOR USING SOCIAL MEDIA IN PR

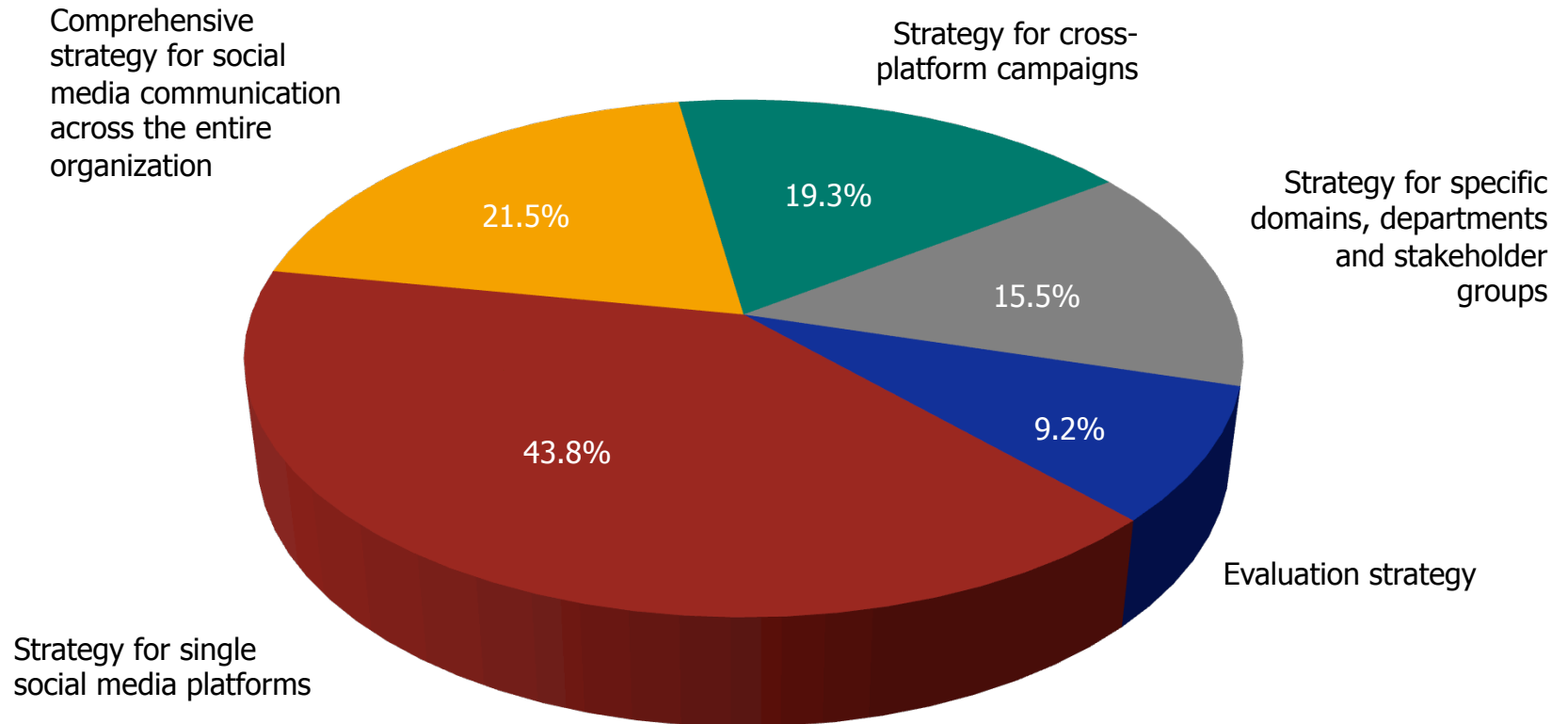
Social media strategy for PR /
corporate communications present
(+ 19% since 2010)



The index of social media strategies I_{SMS} was calculated as a dichotomous value (0 or 1) based on the statements of the surveyed communication managers regarding the existence of specific strategies for the launch and the utilization of social media for public relations / corporate communications within their organization.

SOCIAL MEDIA COMMUNICATIONS STRATEGY

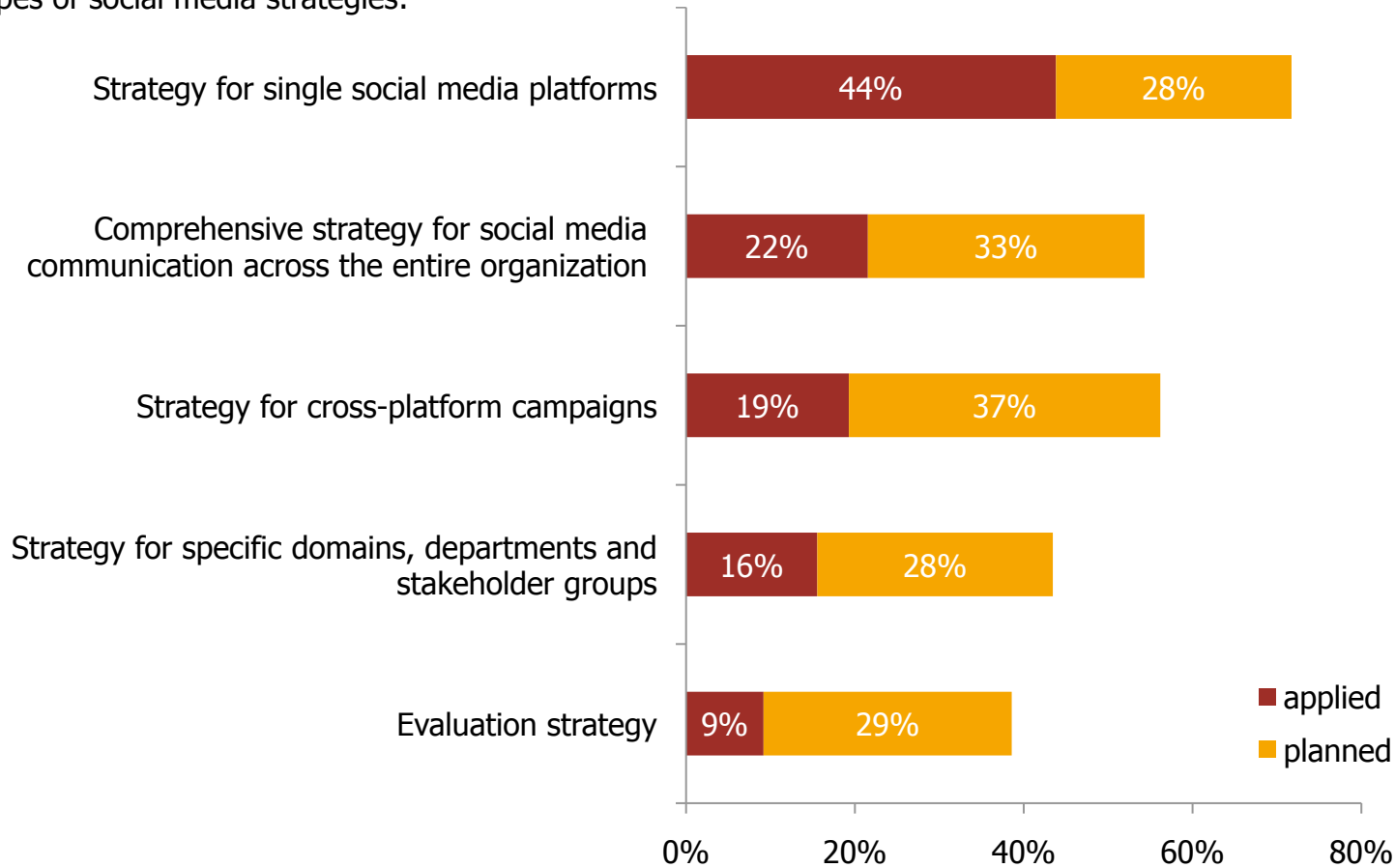
CONCEPTS FOR INDIVIDUAL PLATFORMS ARE PREVALENT



OUTLOOK FOR THE DEVELOPMENT OF STRATEGIES

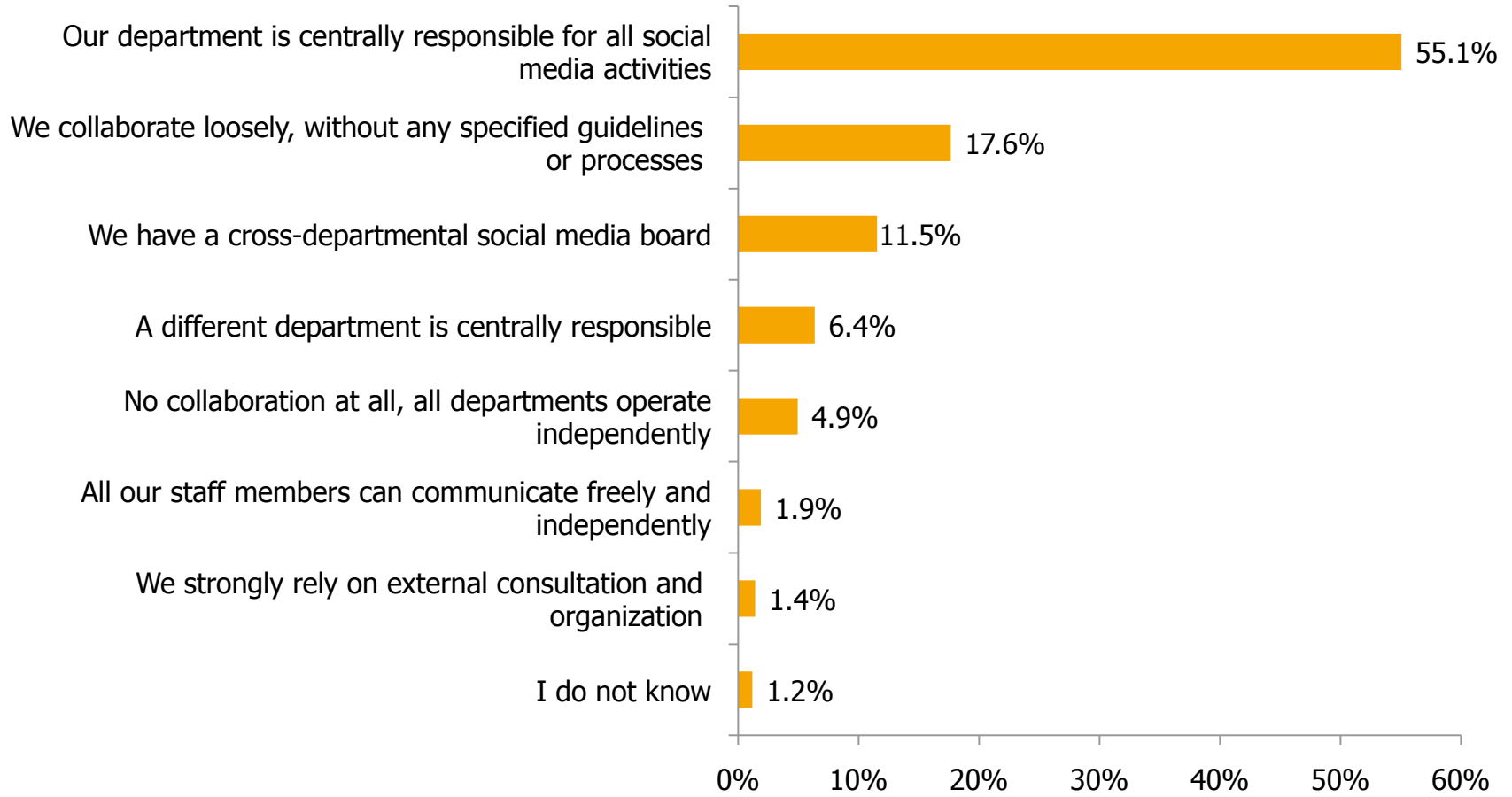
THE GREATEST PROGRESS IS EXPECTED FOR OVERARCHING STRATEGIES

Types of social media strategies:



RESPONSIBILITY AND ACCOUNTABILITY FOR SOCIAL MEDIA

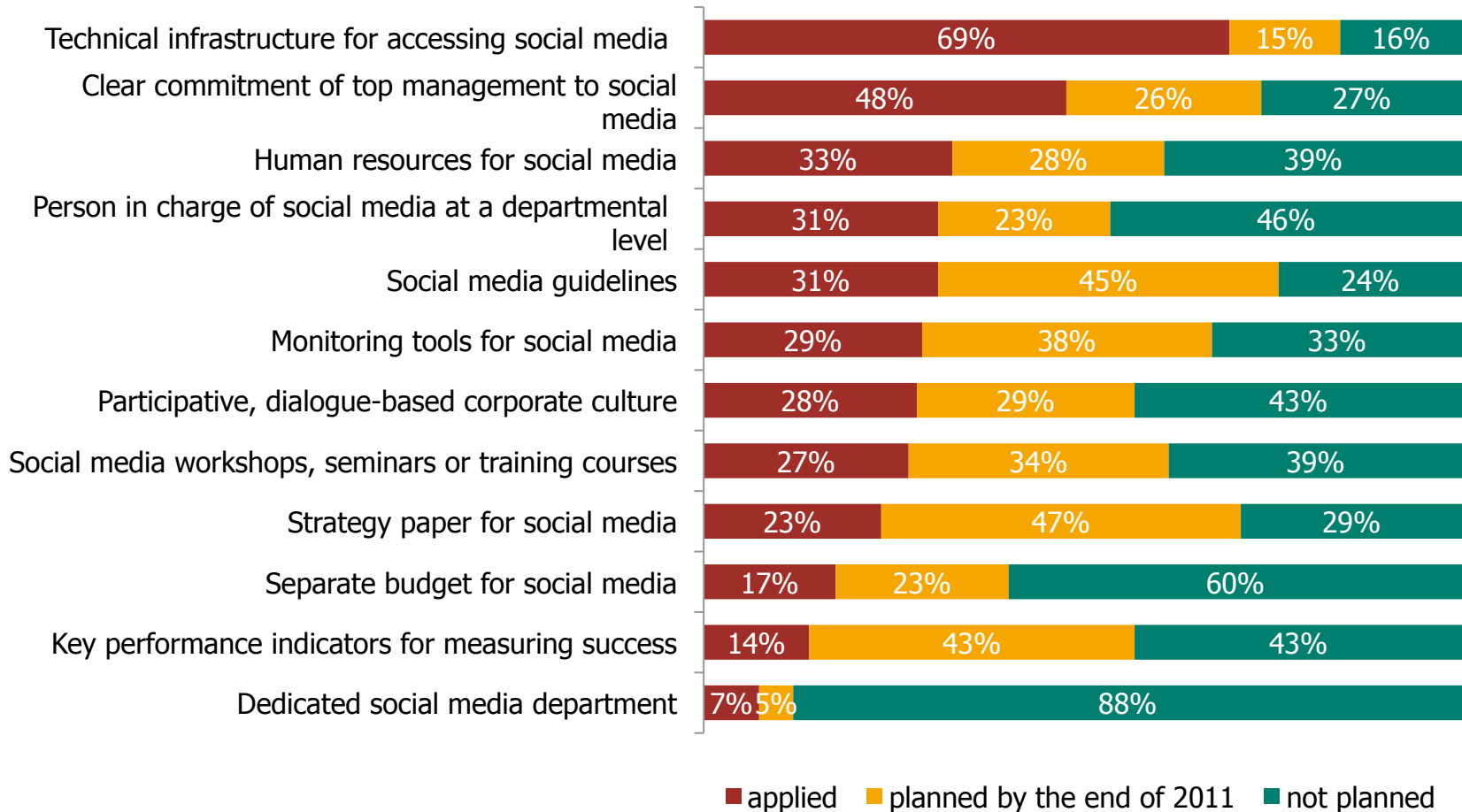
ONLY ONE IN TEN ORGANIZATIONS HAS A CROSS-DEPARTMENTAL BOARD



VII. Social Media
Governance:
regulatory
frameworks
and structures

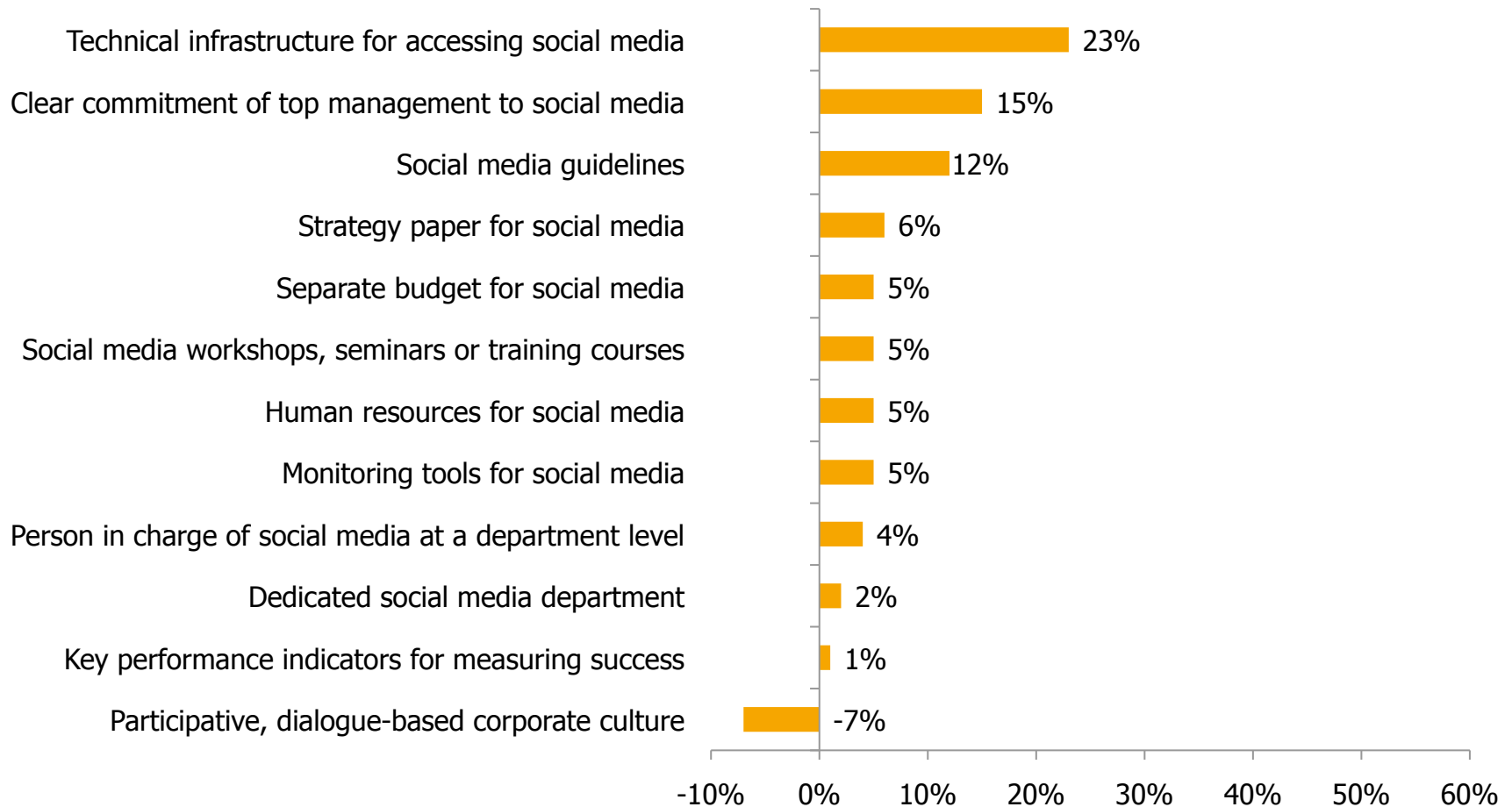
GOVERNANCE STRUCTURES FOR SOCIAL MEDIA

TECHNOLOGIES ARE PRESENT, INDICATORS FOR SUCCESS STILL MISSING



COMPARISON OF GOVERNANCE STRUCTURES 2010 AND 2011

GREAT PROGRESS, BUT LIMITS OF EXISTING CORPORATE CULTURES ARE IDENTIFIED



INFLUENCING FACTORS

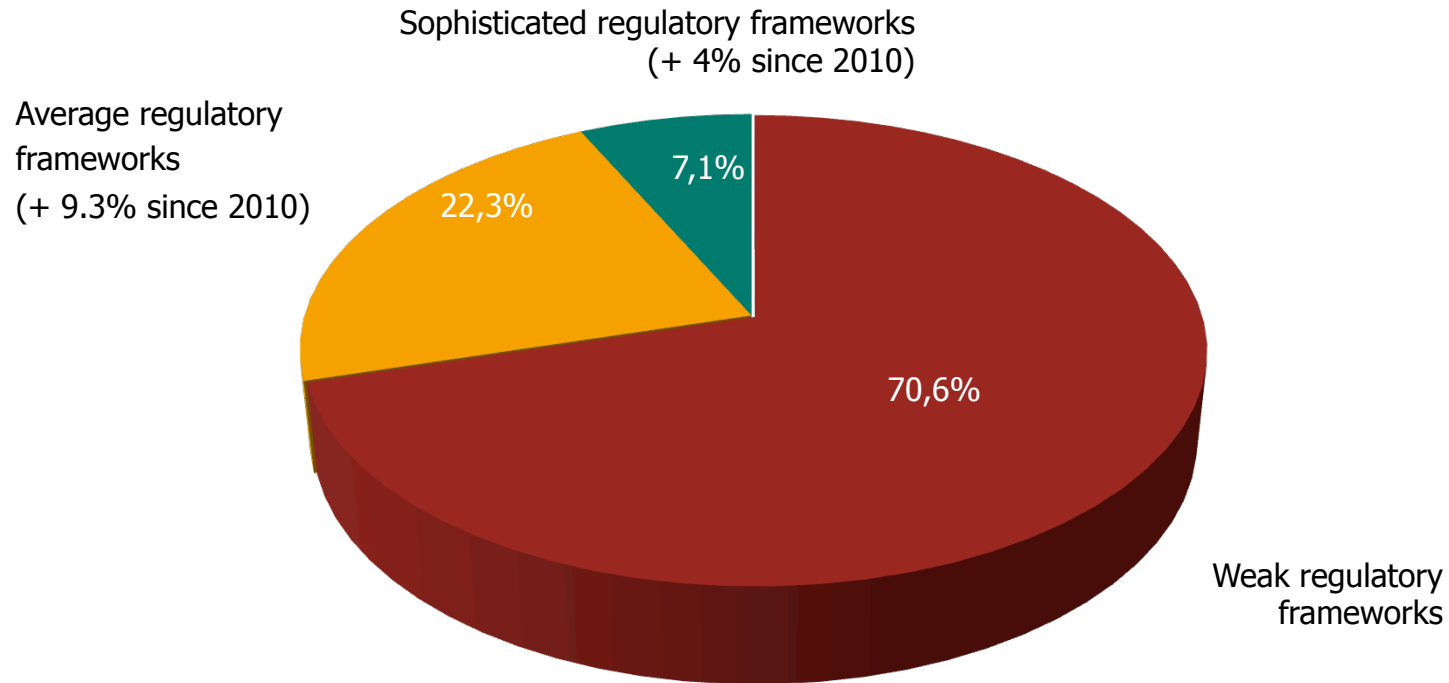
THE REGULATORY FRAMEWORK FOR SOCIAL MEDIA IS STRONGER IN JOINT-STOCK CORPORATIONS AND ORGANIZATIONS WITH HIGH EXPERTISE

	Existing structural elements for social media (average)	
	2010	2011
Joint-stock company	3.83	4.73
Private company	3.38	3.48
Governmental institution or association	2.52	2.87
Non-profit organization	2.86	3.38

	Correlation with regulatory frameworks
	2011
Know-how of the organization	0.595
Social media experience of the organization	0.444
Organization size	n.s.

INDEX OF SOCIAL MEDIA REGULATION

SEVEN IN TEN ORGANIZATIONS STILL DO NOT HAVE DEVELOPED SOCIAL MEDIA GOVERNANCE STRUCTURES



The index of social media regulation I_{SMO} was calculated as the sum of all structural elements governing social media, which are present in the organization. Index values range from 0 to 12.

Weak regulatory framework: $0 \leq I_{SMO} \leq 4$; average : $5 \leq I_{SMO} \leq 8$; sophisticated: $9 \leq I_{SMO} \leq 12$.

VIII. Status quo and
development
patterns of
social media
in PR

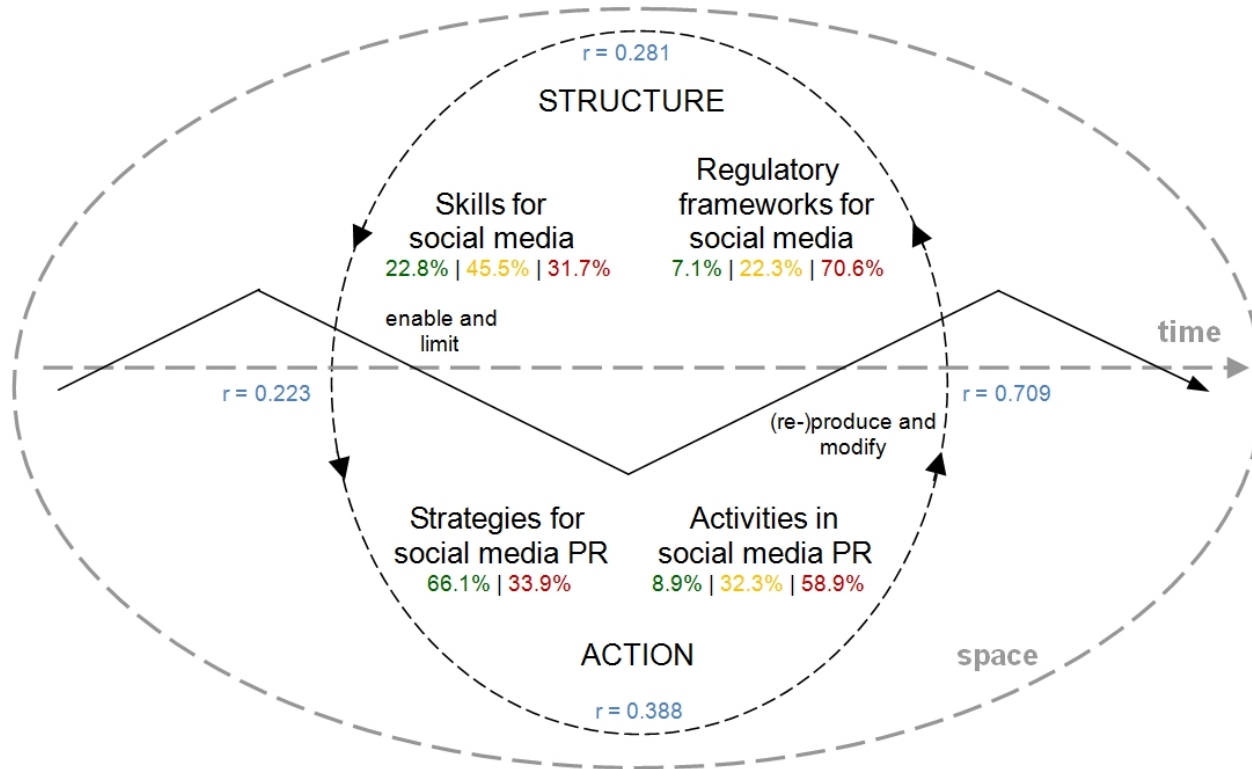
SOCIAL MEDIA IN COMMUNICATION MANAGEMENT

OVERVIEW OF THE STATUS QUO IN GERMAN-LANGUAGE ORGANIZATIONS

Two out of three organizations have already implemented strategies for social media. In terms of expertise levels and structural requirements (Governance), most still seem to be in early stages of development. Accordingly, only few organizations comprehensively utilize social media tools, networks and applications. Compared to the previous year, however, all areas have developed further.

Social media expertise of communications professionals	high 22.8% (16.8%)	medium 45.5% (41.9%)	low 31.7% (41.3%)
Social media activity of the organization	intensive 8.9% (12.8%)	medium 32.2% (21.0%)	low 58.9% (66.2%)
Social media strategy for PR/ Corporate communications	present 66.1% (47.1%)		not present 33.9% (52.9%)
Social media regulatory frameworks	sophisticated 7.1% (3.1%)	medium 22.3% (13.0%)	weak 70.6% (83.9%)

DYNAMICAL DEVELOPMENT OF SOCIAL MEDIA IN ORGANIZATIONS



Green values: Proportion of respondents with high skill levels, existing strategies, intensive activities and sophisticated regulatory frameworks (index values) | **Yellow values:** medium skill levels, medium activities, medium regulatory frameworks | **Red values:** low skill levels, no strategies, low activities, weak regulatory frameworks | **Blue values:** Correlation coefficient according to Pearsons or Spearman at a significance level of $p < 0.05$

DISCUSSION AND OUTLOOK

The development patterns of social media within organizations can be illustrated by the structuration theory. The actions of individual actors can only succeed because all involved can resort to structures in the sense of a common stock of (informal) rules and resources. These structures make individual actions possible and limit their scope, while their repeated update reproduces and anchors them. The establishment of social media in PR can best be illustrated as communication professionals first setting up cognitive expertise for the topic, then developing strategies for its utilization in everyday work, followed by concrete activities based on these strategies. The repeated application ultimately leads to the emergence of a regulatory framework – from responsibilities and budgets to key performance indicators. The question, however, is whether this governance is allowed to evolve unchecked or if it is systematically analyzed and based on overriding organizational goals.

The study indicates that 70 percent of analyzed organizations so far only have weakly developed regulatory frameworks. At the same time, the presence of a formal regulatory framework has a positive effect on the expertise levels (correlation coefficient $r = 0.281$). These in turn affect the development of strategies ($r = 0.223$) and the activity level on the social web ($r = 0.307$).

This means that the establishment of governance structures for social media and the deliberate increase of communication professionals' skills in this area – beyond private use – will promote the long-term rooting of social media in communication management.

IX. Authors and
partners of
the study

AUTHORS

Stephan Fink

Stephan Fink, born in 1957, is Chairman of the Board of Fink & Fuchs Public Relations AG, Wiesbaden, Germany. After graduating with a degree in business, he established the PR agency, which is specialized in technology-related topics. With more than 20 years of experience in communications and management consulting, he advises companies, associations and government agencies on issues such as the application of new media in business processes. Stephan Fink is an associate lecturer at the University of Leipzig and a member of the state commission advising media politics in the federal state of Hesse.

» Twitter: www.twitter.com/stephanfink, www.twitter.com/finkfuchs » E-Mail: stephan.fink@ffpr.de

Ansgar Zerfass

Prof. Dr. Ansgar Zerfass, born in 1965, is a Professor for Communication Management at the University of Leipzig and Executive Director of the European Public Relations Education and Research Association, Brussels. He has published 26 books and more than 140 journal articles and book chapters on corporate communications. Since the 1990s, Ansgar Zerfass has created several online portals, for which he received the German PR award and the German Multimedia Award. He started to research online public relations early and published his first book on the subject in 1998.

» Twitter: www.twitter.com/zerfass, www.twitter.com/SocMediaScience » E-Mail: zerfass@uni-leipzig.de

Anne Linke

Anne Linke, born in 1983, is a research fellow at the department of communication management at the University of Leipzig. After receiving a masters degree in communication and media science and sociology, she is currently conducting research within the scope of a doctoral dissertation project on social media communications.

» Twitter: www.twitter.com/annelinke, www.twitter.com/SocMediaScience » E-mail: anne.linke@uni-leipzig.de

PARTNERS AND INITIATORS OF THE STUDY

University of Leipzig, Department of Communications Management and Public Relations

The University of Leipzig is considered to be one of the leading research institutions and think tanks for Strategic Communication and Public Relations in Europe. Its Communication Management Master's Program (ranked number one among German PR university programs in 2010) is the first of its kind to consistently integrate corporate management and communications. The research activities of the department are documented in more than 70 German and English books and in more than 300 journal articles and book chapters. » www.communicationmanagement.de

Fink & Fuchs Public Relations AG

Fink & Fuchs Public Relations AG is the agency for successful communication of technology-driven change. Established in 1988, the company has around 70 employees in Wiesbaden and Munich and generated a gross income of EUR 5.6 million in the fiscal year 2010. The agency currently handles the PR accounts and social media activities of approximately 50 customers in the areas of information technology and telecommunications, consumer technology, energy, the environment and new materials. Within the past few years, the agency received 22 communication awards. » www.ffpr.de

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