



Social Media in Companies

The online relationship with the market



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Apart from this summary, see more details about the results of this survey by accessing the complete report on our website:

www.deloitte.com.br

Executive summary

After the breaking down of physical barriers fueled by the Internet worldwide, access to information has become much easier and faster. At the Web, connected customers have gained more bargain power and they play now the role of decision-makers that interfere in the reputation of suppliers, influencing and being influenced by other people navigating on the online medium world.

At the same time, these media have opened opportunities for companies to foster debates on their own products and services. An so, through the aggregate of opinions on their brand from large groups, these companies can benefit from a type of collective intelligence which can surely bring innovation and differentiation to their products, services and other elements of their business model.

In this context, Deloitte has developed the “Social Media in Companies” survey with the aim to determine the degree of maturity achieved by Brazilian organizations as to the social media boom in the world.

Through this study, Deloitte’s efforts were aimed at showing how the social media can be used as a strategic business pillar while bringing consumers and suppliers near to each other.

Identifying the benefits of these online tools, the survey also introduces the social media as a social platform through which companies can use not only as an advertising channel, but mainly as a way of getting closer to their consuming public.

Fábio Cipriani

Deloitte Consulting manager and social media specialist

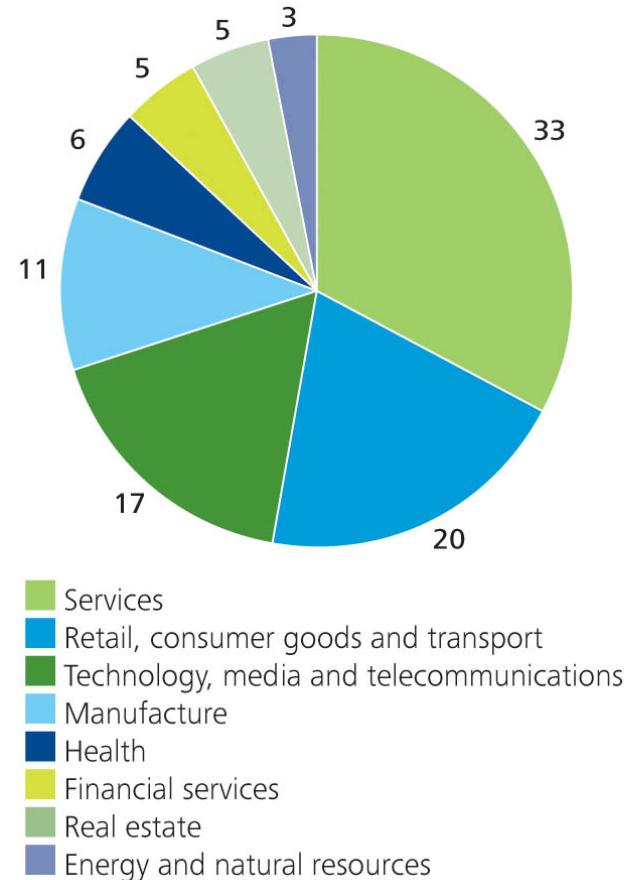
Main conclusions

Which companies use or monitor on social media?

Within the survey's universe, 70% of the surveyed companies stated to use and/or monitor social media. The most active industries are services, retail, consumer goods, transport and technology, media & telecommunications.



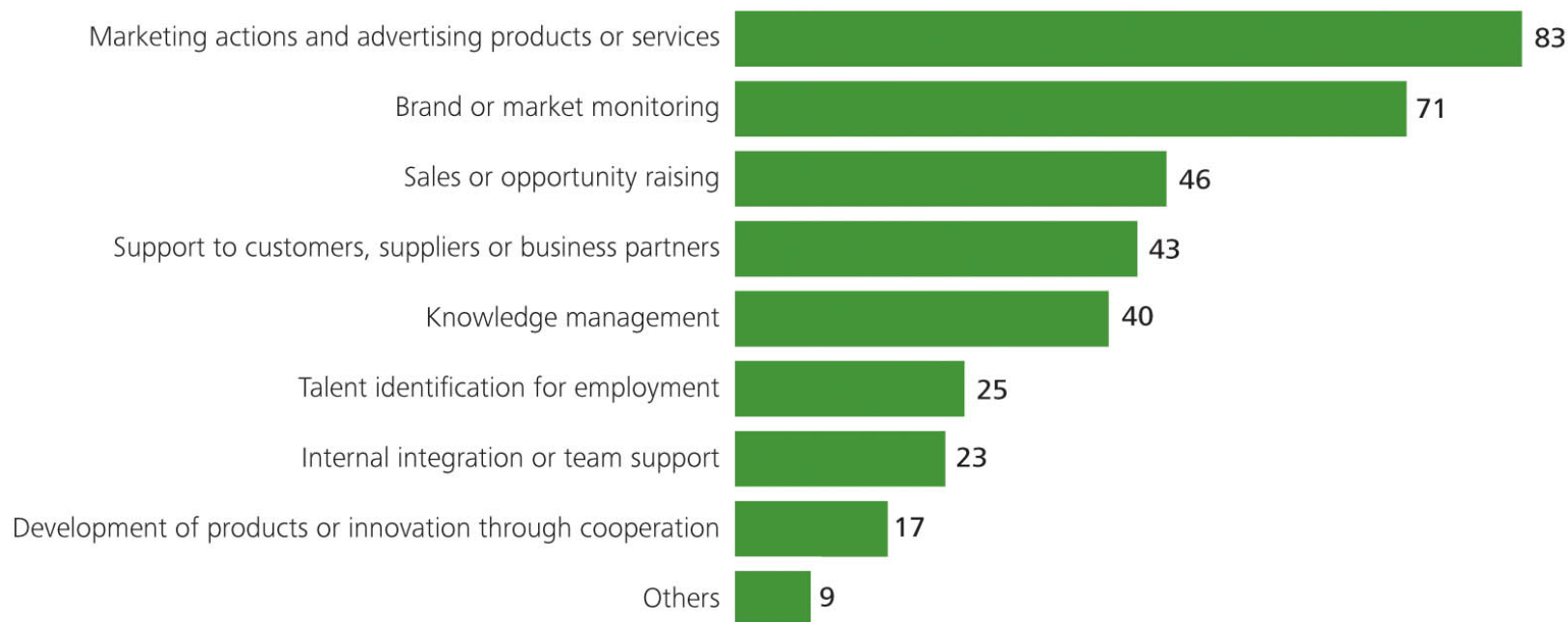
Distribution by respondent company segments (%)



Social media are more used as a medium than as a social platform

Marketing represents 83% of the initiatives on social media

Most explored initiatives by companies using social media (%)

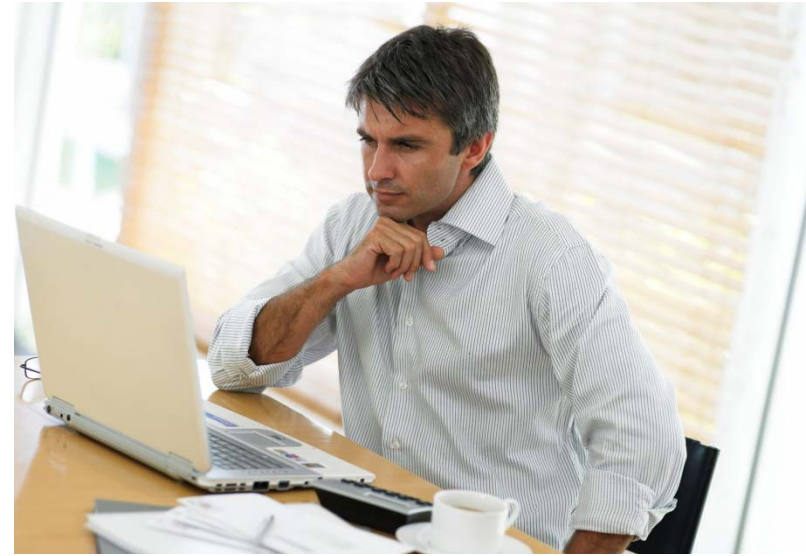


Multiple answers questions

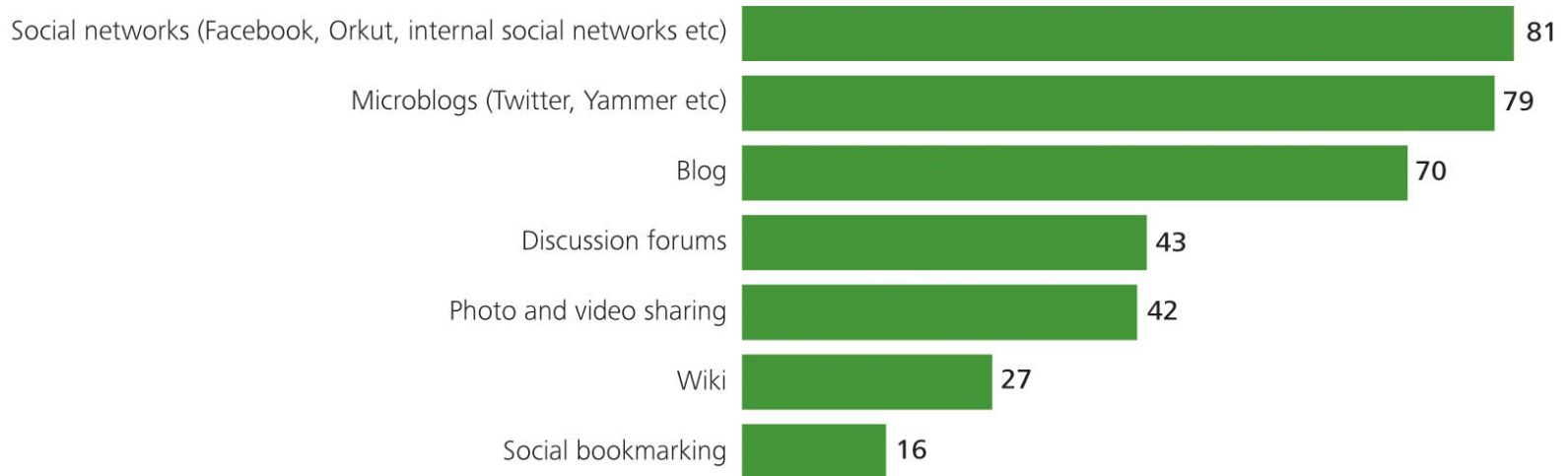
Actions strongly based on **relationship** between people as sales, opportunity capture, support to customers, team integration and cooperative product development are **the least prioritized** by the Brazilian companies.

Social networks, microblogs and blogs are the tools most used by the companies

Microblogs are close to leadership thanks to Twitter



Most used tools by companies using social media (%)

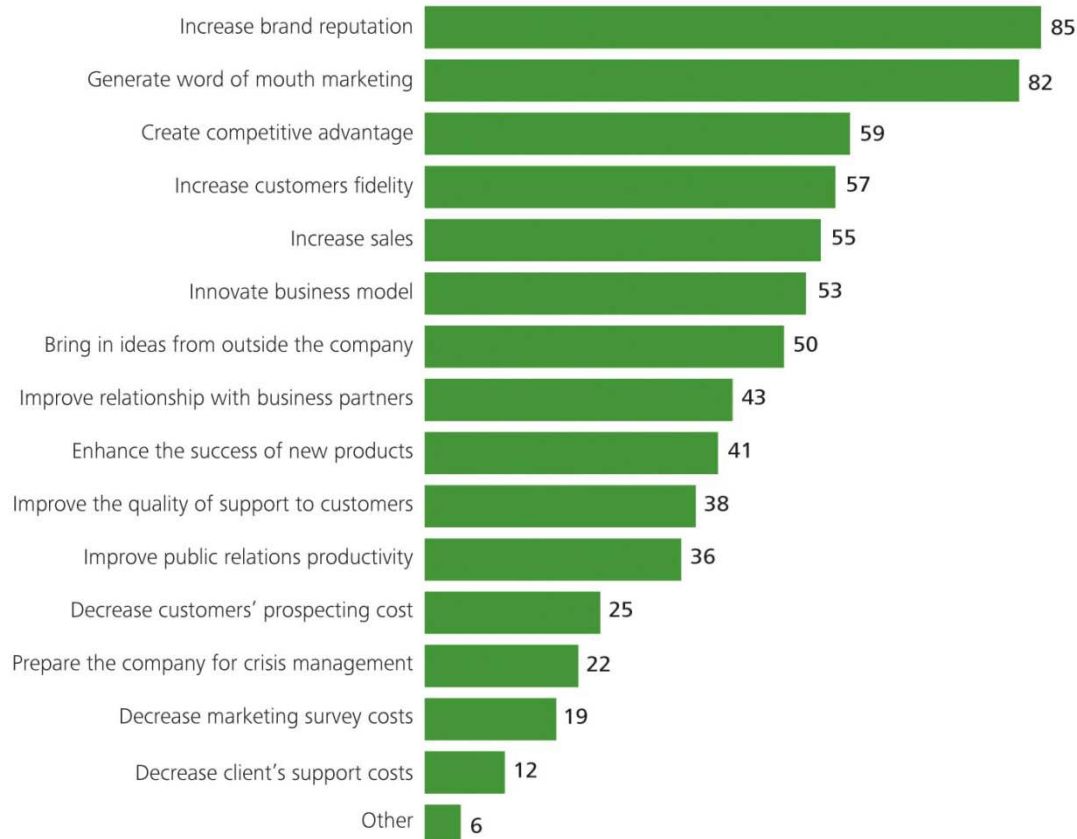


Multiple answers questions

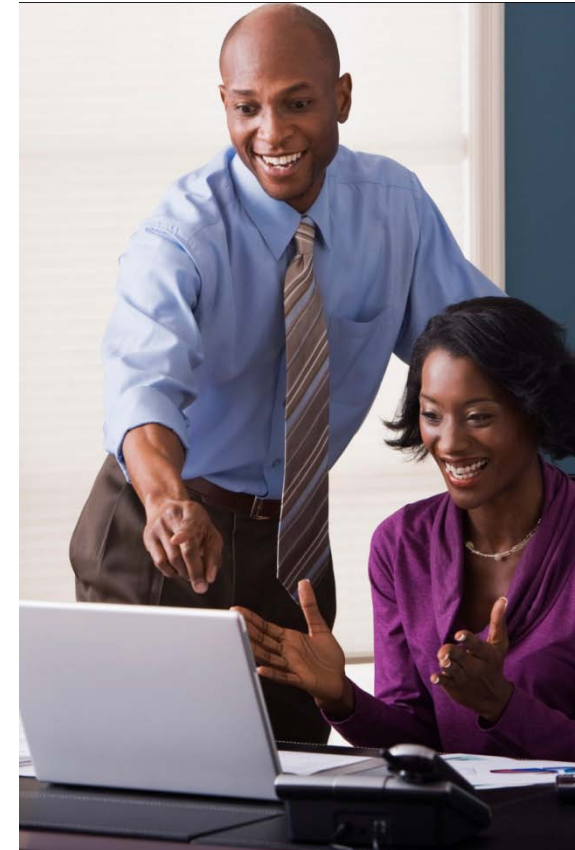
What are the companies' strategic goals when investing in social media?

Brand reputation and word of mouth marketing are the most common goals among the companies

Business goals for use of social media (%)



Multiple answers questions

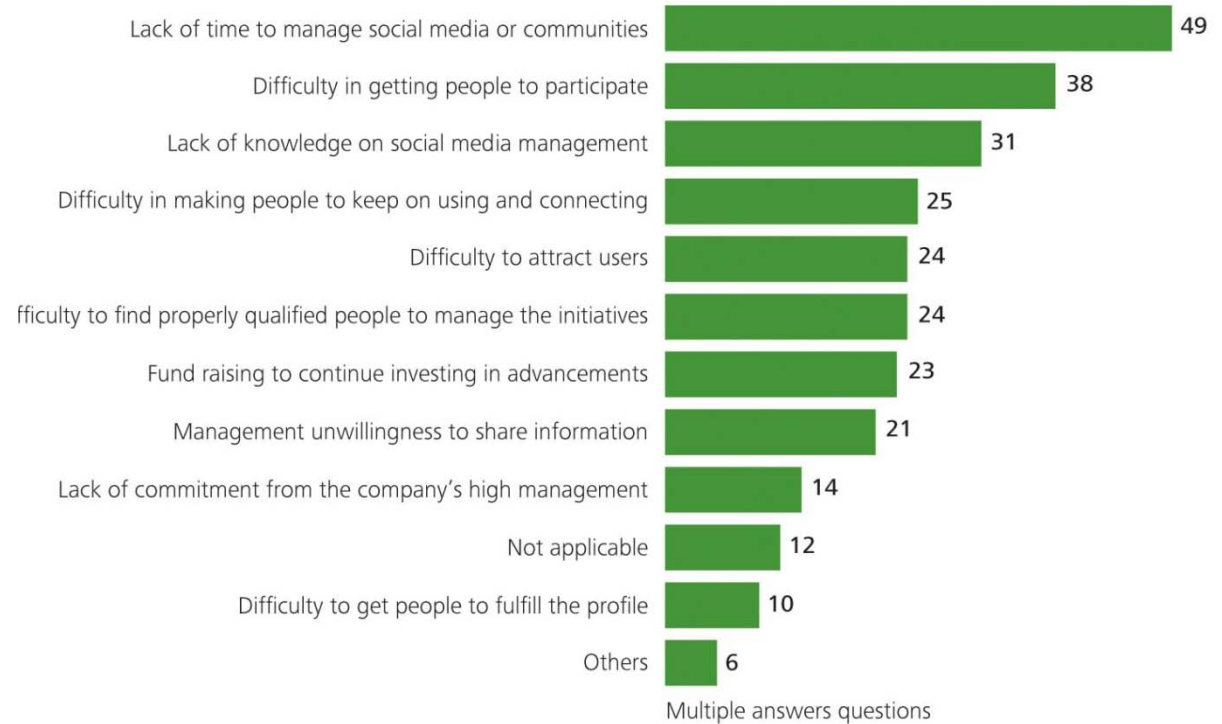


Obstacles to social media success

49% of the companies state their difficulty in finding the time for social media management



Main obstacles hindering social media success (%)



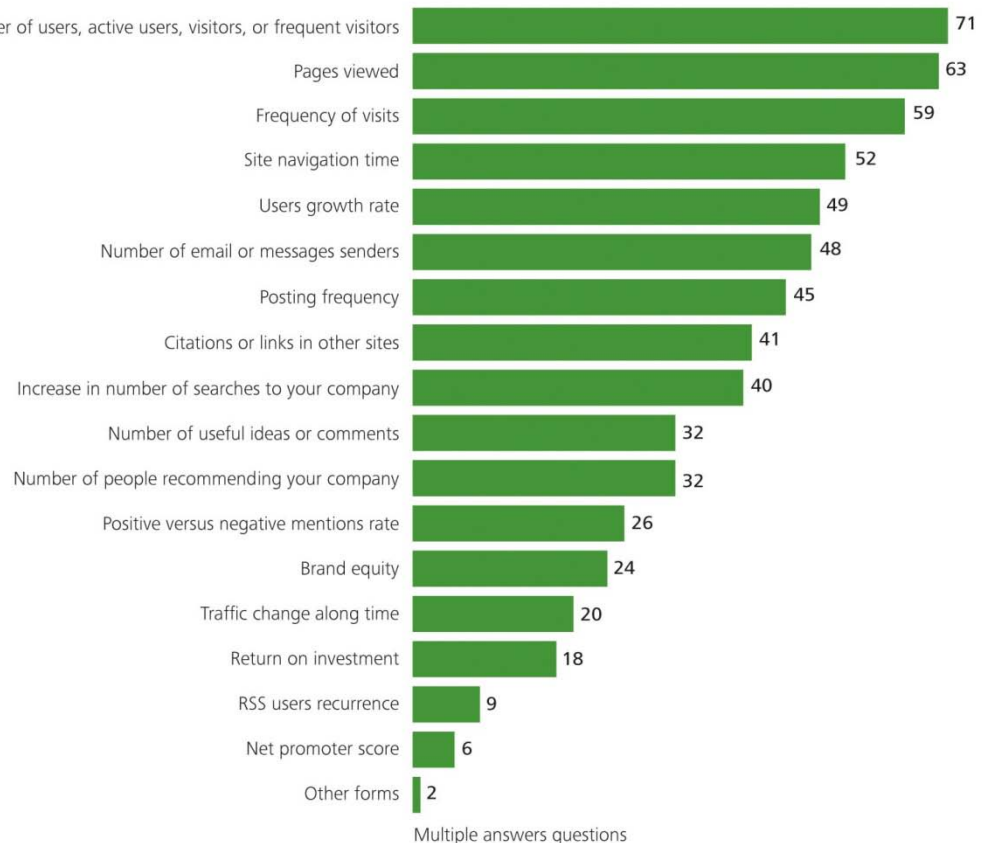
There is great difficulty in converting the results from the use of social media into value

The companies focus is on the measurement of operating indicators instead of financial returns



Without the understanding of the financial impact on the results of the companies, **it is hard to justify the sustainability of the initiatives** management and shareholders, and even internally to the very departments in charge of social media.

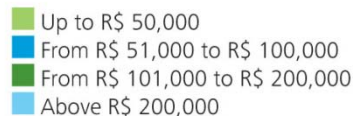
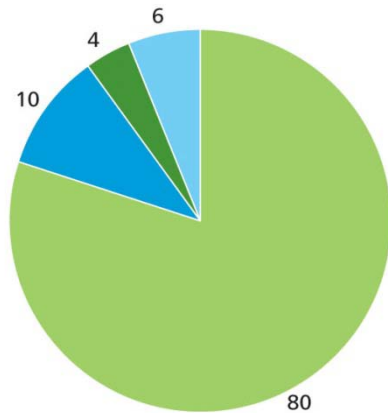
Social media initiatives measurement types (%)



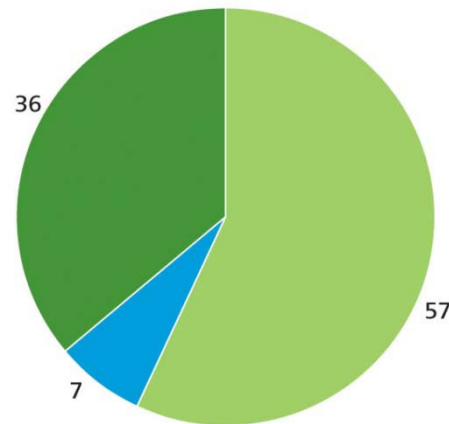
What's the companies' investment trend on social media?

Approximately 60% of the companies surveyed stated to have the intention to increase the invested value within the next 12 months.

Companies' annual investment on social media (%)



Investment trend on social media in the next 12 months (%)



The majority of the companies still **invest timidly** in this new communication channel with the market.



...and who is not in?

“We don’t have someone in charge”

Difficulty to **measure** and **monitor** the benefits and **lack of knowledge** on the matter are the main barriers for the adoption of social media.

The market wish to invest

86% of the interviewed not using social media intend to start **to invest in this communication channel** within a period of maximum 3 years

Advertising of products and services

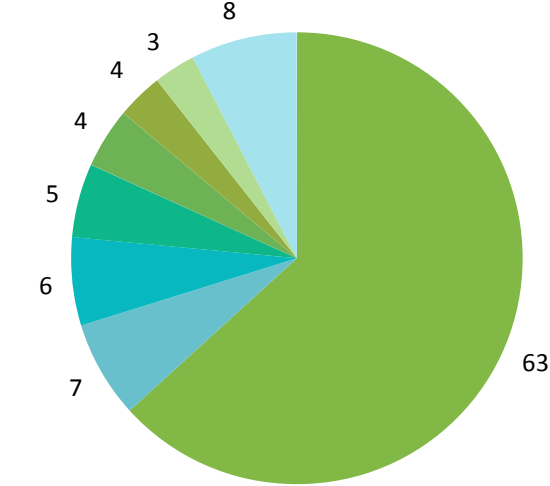
84% of the interviewed not using social media intend to invest in **marketing campaigns** and **advertising of products and services**

Survey additional data

Sample profile

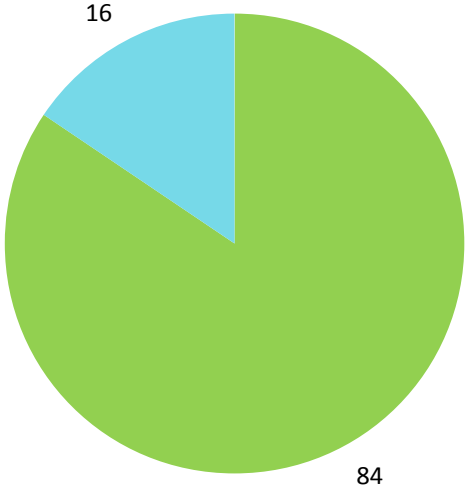
The survey sample indicates that 63% of the respondents are located in the state of **São Paulo**, 84% are **national companies** and 52% record revenues up to **R\$ 50 million**.

Surveyed companies home state (%)



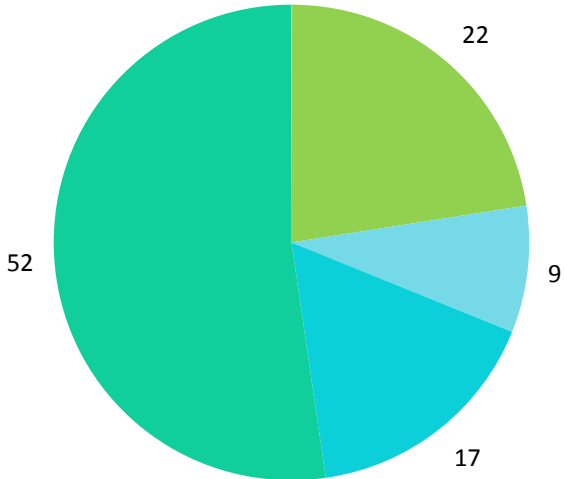
- São Paulo
- Rio de Janeiro
- Minas Gerais
- Rio Grande do Sul
- Paraná
- Santa Catarina
- Pernambuco
- Outros

Surveyed companies nationality (%)



- National
- Multinational

Surveyed companies revenue (%)



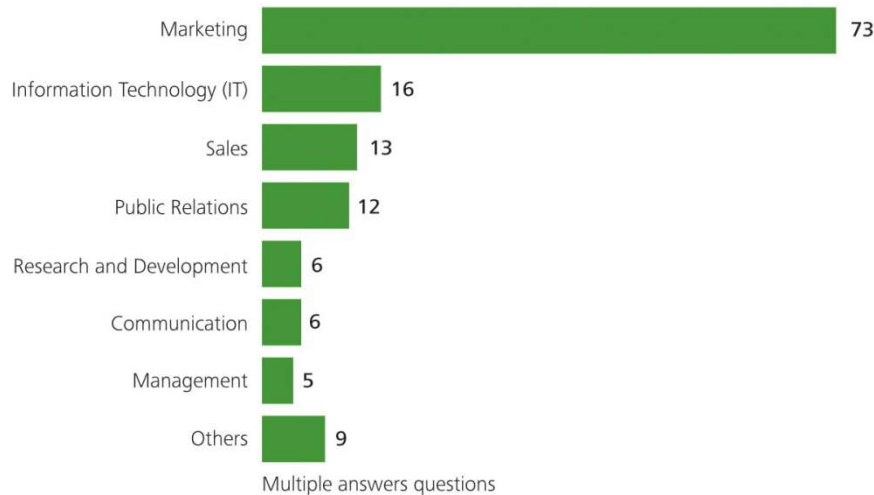
- Above R\$ 500 million
- From R\$ 201 million to R\$ 500 million
- From R\$ 51 million to R\$ 200 million
- From R\$ 5 million to R\$ 50 million

Who performs or brings the social media to functionality?

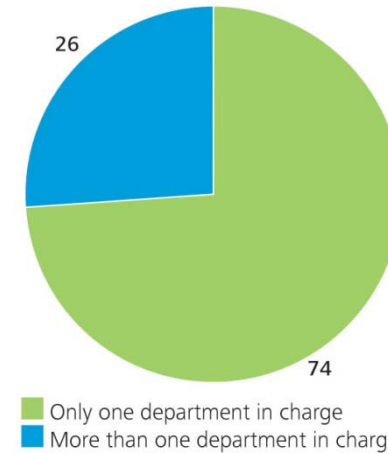
Marketing is the main department in charge of social media. This statement can be evidenced when considering that the main actions exploited on social media are marketing and advertising campaigns. The management team is rarely engaged.

45% of the companies don't have a fully dedicated person to the task.

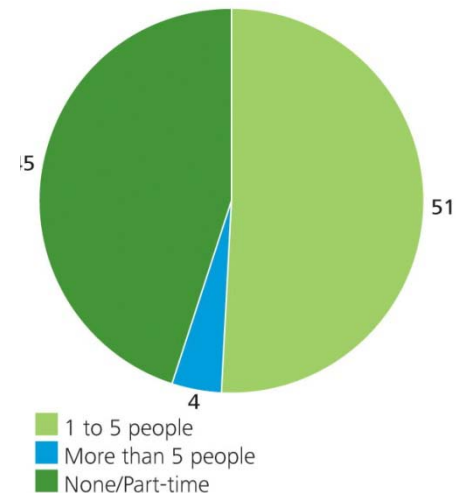
Department in charge of social media actions(%)



Number of departments in charge of social media actions (%)



Number of professionals fully dedicated to social media (%)

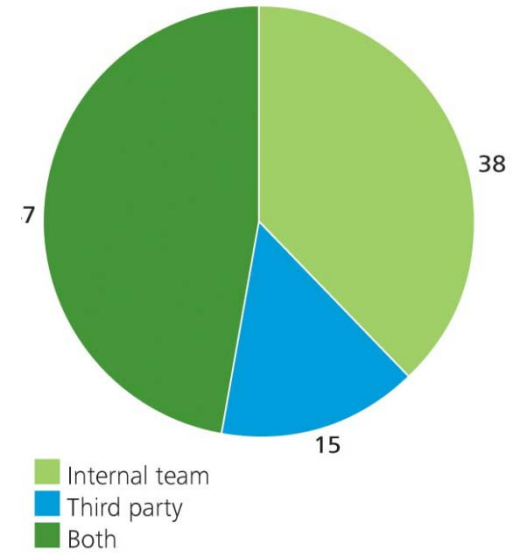


Performance of teams in charge

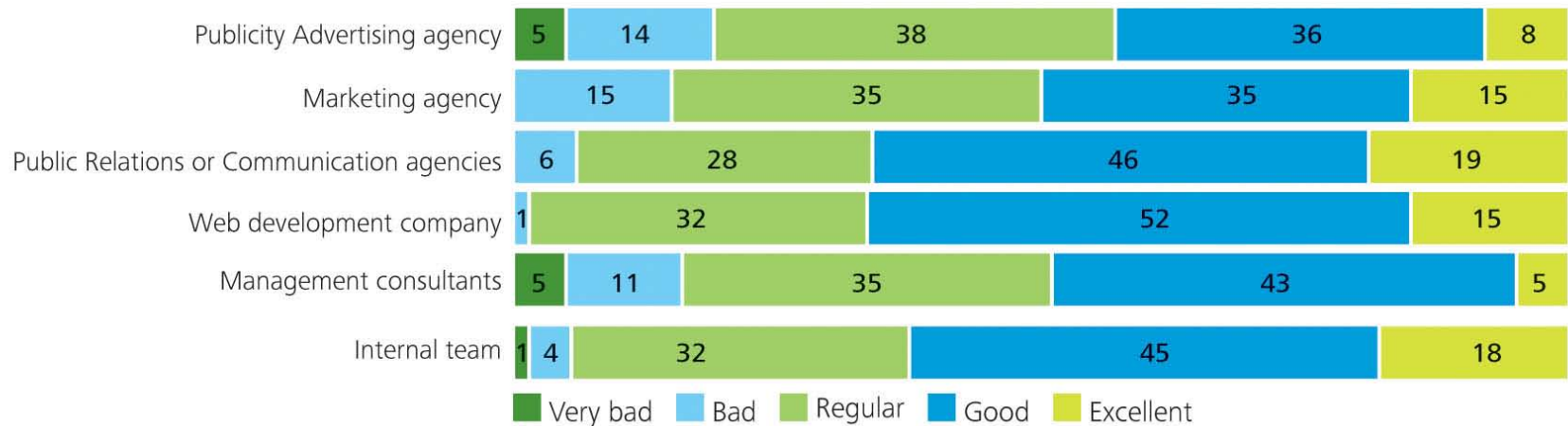
Companies' satisfaction towards the services rendered by all areas in the survey is of average degree, keeping to "regular" and "good" rates.

There's room to improve

Team in charge of social media actions (%)



Company's degree of satisfaction on services rendered by the team performing social media initiatives (%)

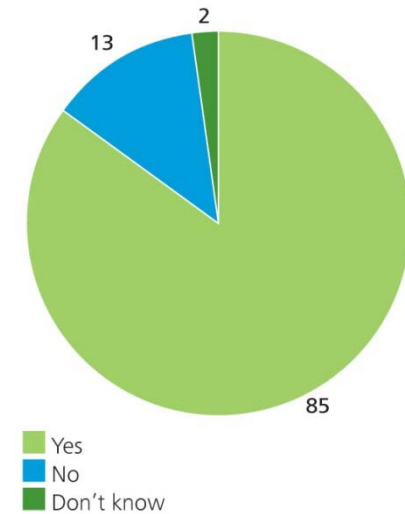


Reasons for use and competitive vision

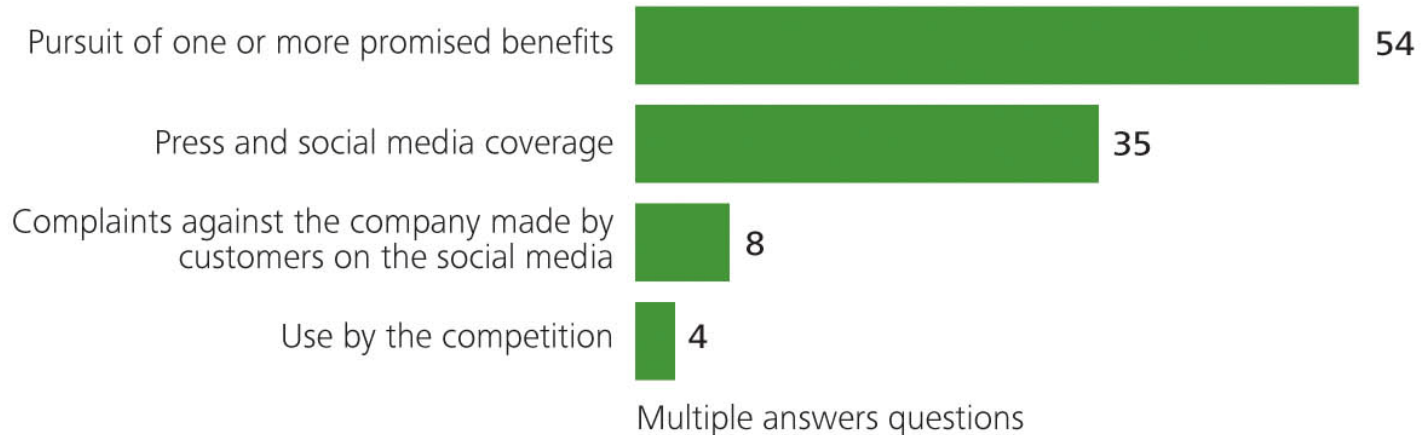
A large portion of companies, approximately 35%, stated to use social media due to the coverage by the press and the very social media broadcasting. Some of these companies may have followed the trend onto the social media, but whether the expected results are being achieved still remains to be seen.

84% of the companies visualize their competitors' actions, but only 4% of them started to using social media due to this fact.

Companies that visualize or have visualized their competitors' social media action (%)

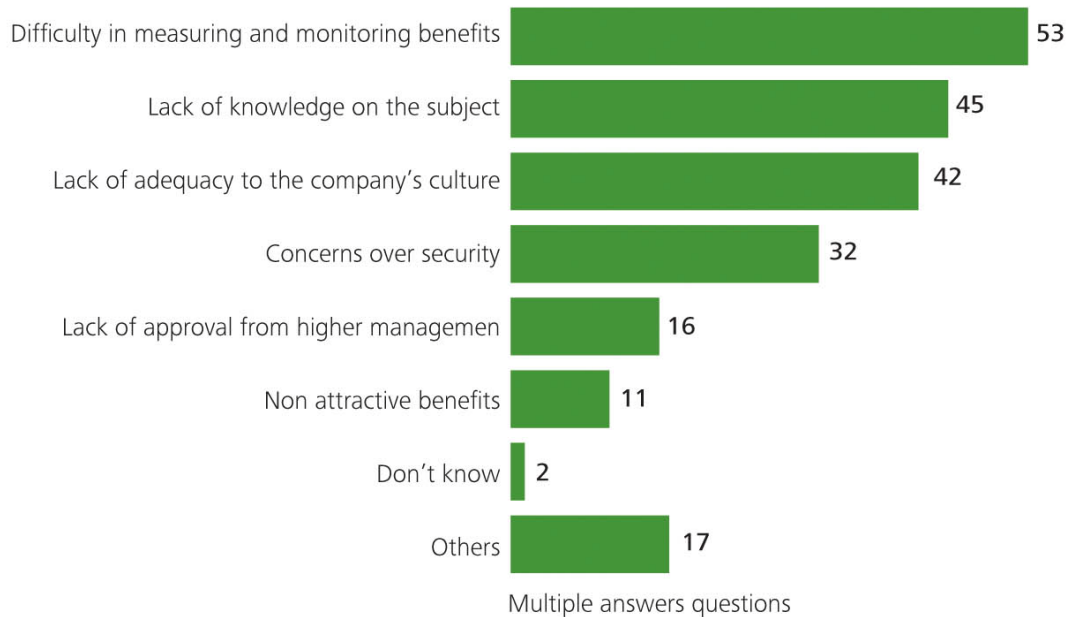


Leading factors for companies to use or monitor on social media (%)

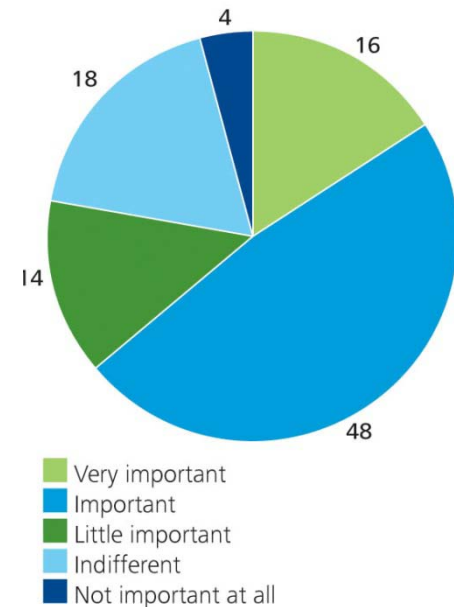


The results of companies not using or monitoring on the social media

Primary barriers hindering the use of social media (%)



Degree of importance given to social media (%)



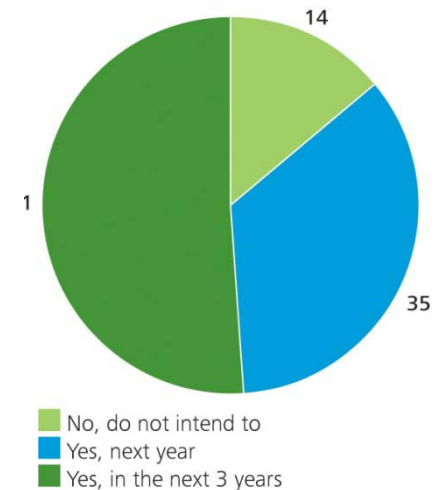
Even facing barriers, 64% of the companies still consider the social media of **importance to business**.

What's the plan of the companies not yet engaged?

Most interest-rising social media (%)



Companies intending to invest in social media (%)

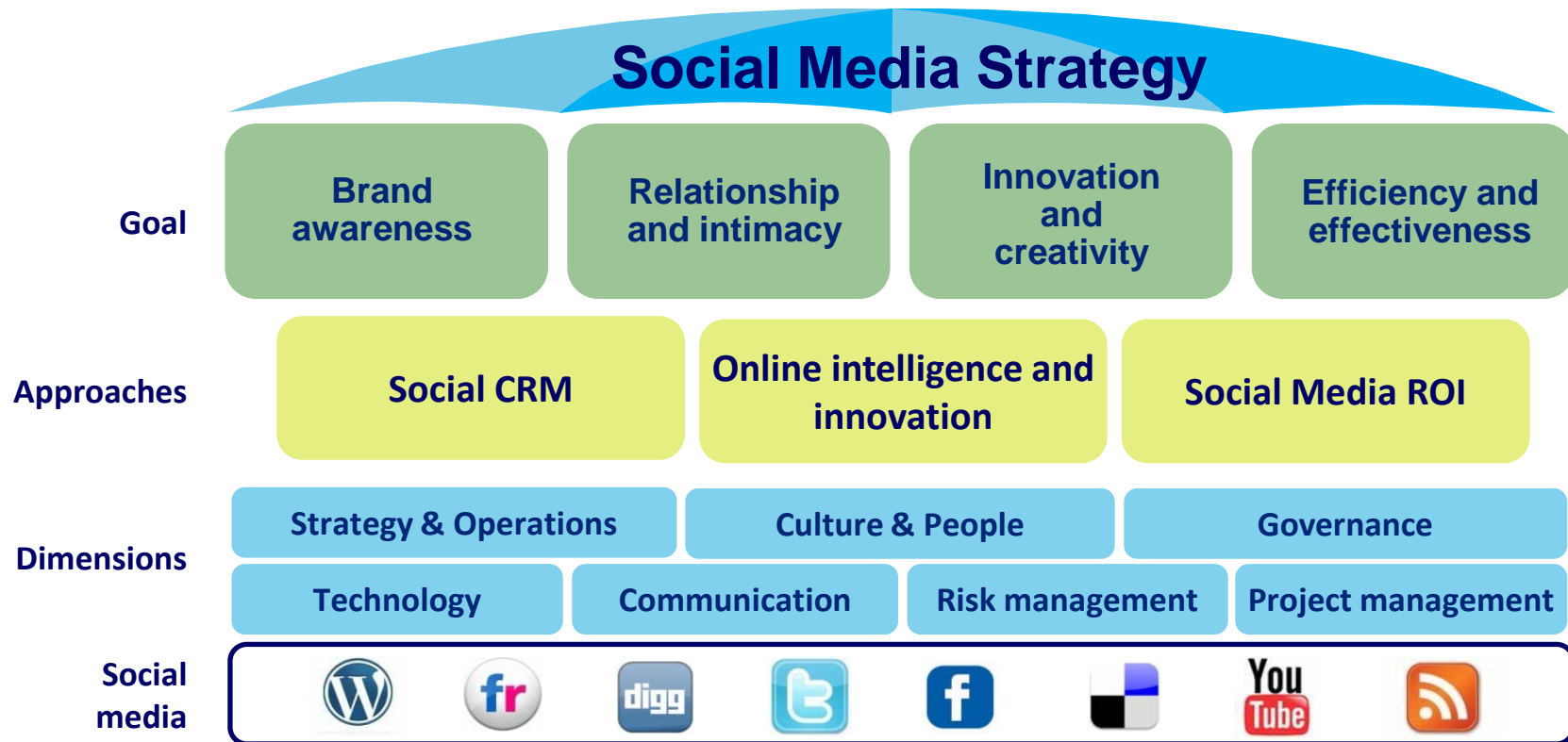


Over the next three years, 86% of companies that do not use or monitor social media will already have changed sides, probably investing **in marketing and later in customer relationship**.

Our value propositions on social media

Our vision on social media strategy

An umbrella of elements that are to be used by successful companies on social media



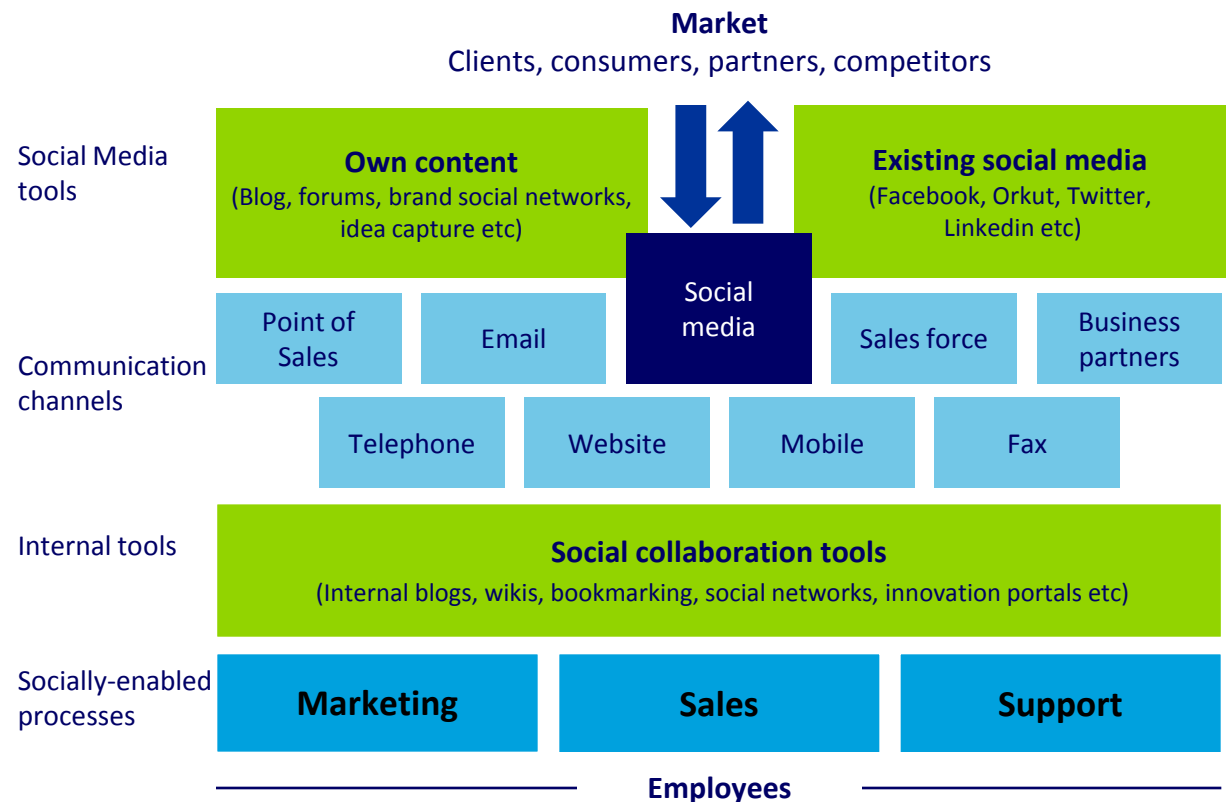
Our value propositions follow **three complementary lines** of approach, which can be applied separately in accordance with our customers' needs. They are **Social CRM**, **Online intelligence and innovation** and **Social Media Return on Investment (ROI)**. These three together are called **Digital customer experience program**.

Social CRM

Customer Relationship Management in the new times

The new behavior of customers, thanks to the Internet and the social media, demands a **new strategy**, a differentiated segmentation, new channels, customized messages, and new business processes.

Deloitte's approach to Social CRM helps you to **improve your customer's experience with your brand, and to establish a long-term relationship** with them through discussions and creation of communities on social media.

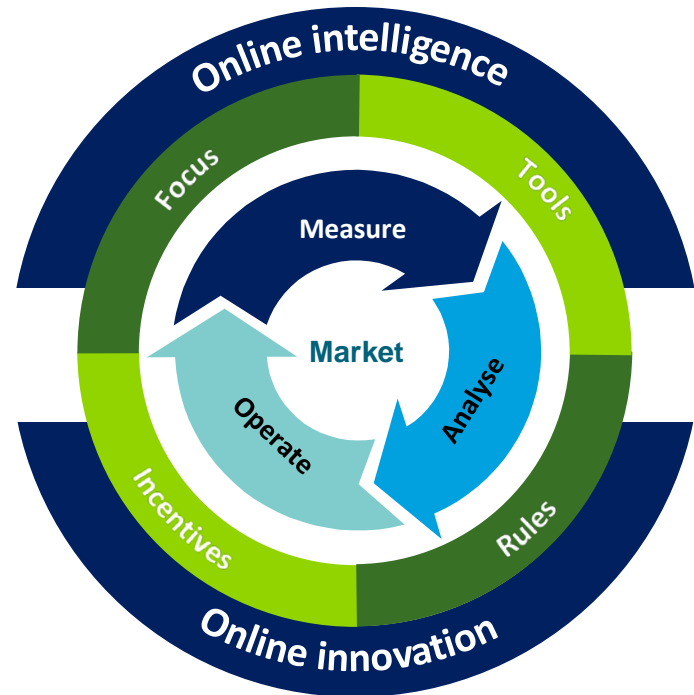


Online intelligence and innovation

Listen to your market and extract value from the interaction with people and among them

With the breaking down of physical barriers fueled by the Internet worldwide, access to information has become much easier and faster but at the same time the quantity of noise we get has increased. Companies need to **learn how to listen to the proper sources and filter the results** of their research accordingly so as to extract the relevant information that would bring value to the company's strategy.

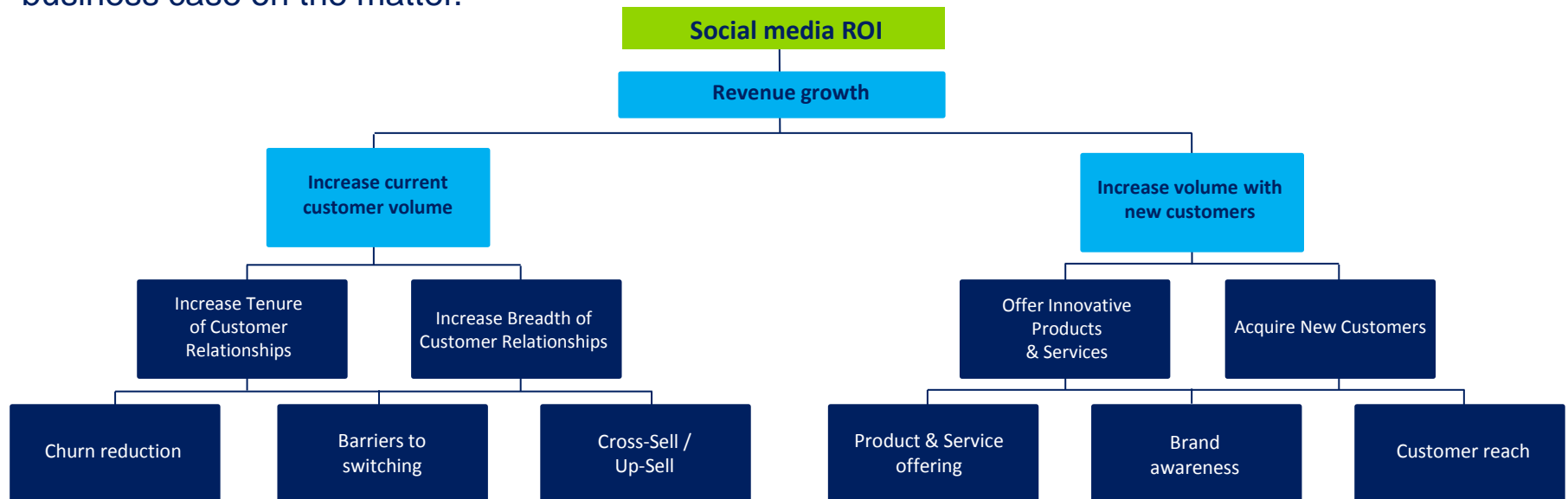
Deloitte offers a well structured methodology to **extract value from the mass connected to Internet, particularly on social media**, helping your company in the search for online collective intelligence to enable your strategy execution.



Social Media ROI

Mapping and measuring the value generated by the social media

Many companies fear to using social media as a way of communication with the market because **they are not aware of their benefits or do not know how to measure the return on investment** of this initiative. These facts inhibit and also impair the company for the impracticability of convincing the high management without any evidence of a well structured business case on the matter.



To help your company to understand the actual value that can be extracted from social media, Deloitte translates operational and qualitative metrics into value to the shareholders by using a value map to the company called the **Enterprise Value Map™**.



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