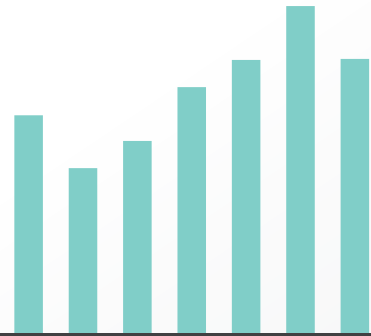




**HOOTSUITE**  
**BAROMETER**   
**2018** | **GLOBAL**



# Hootsuite Social Media Barometer

Annual report on how organizations  
are using social media

**GLOBAL REPORT 2018**

# Contents

|   |    |
|---|----|
| Overview  | 3  |
| Summary of findings                                       | 3  |
| Methodology   | 4  |
| Social media is more important than ever                  | 6  |
| Organizations are more active across more social networks | 9  |
| Social goals are broader—and harder to achieve            | 16 |
| Organizations face multiple challenges with social        | 23 |
| From challenges to opportunities                          | 28 |



# Overview

*Hootsuite Social Media Barometer* shares the results of a global survey by Hootsuite on how and why organizations around the world are using social media.

We look at how companies of different sizes, and targeting different audiences, use social across four regions: North America (NA); Europe, the Middle East, and Africa (EMEA); Asia Pacific (APAC); and Latin America (LATAM).

## The report examines three key areas:

- How are organizations managing social?
- What do they do on social?
- What challenges do they face with social?

## Summary of findings

A major finding of this year's report is that North America no longer leads the way; across all regions, organizations consistently reported a common set of social media goals and challenges.

## Other key findings include:

- Social media is increasingly important to organizations around the world.
- Organizations are using social media to support initiatives beyond marketing in areas such as sales and human resources.
- Large enterprise organizations face more challenges in coordinating social media between multiple departments.
- Use of mobile messaging apps like Facebook Messenger, WhatsApp, and WeChat is higher in organizations in APAC and LATAM countries than in the rest of the world.

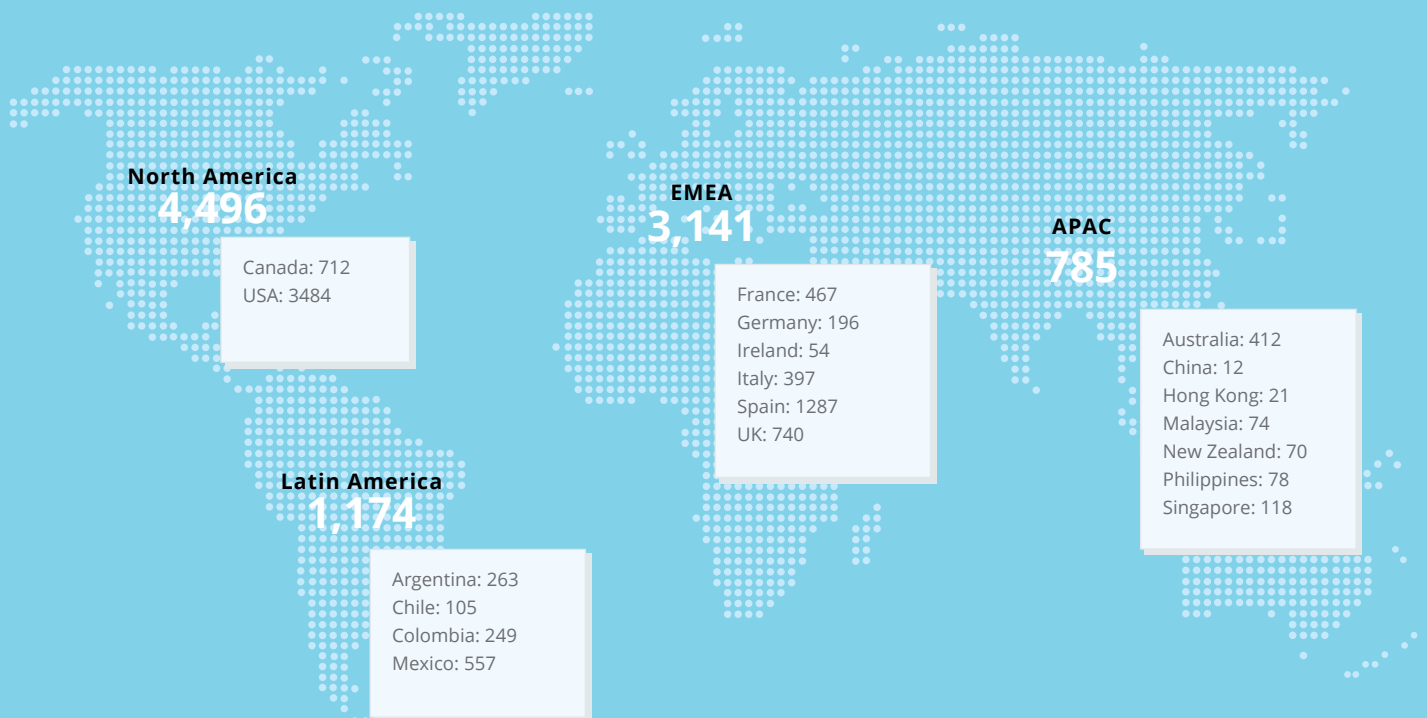
# Methodology

The Hootsuite Social Media Barometer survey was fielded to over a million social media users worldwide, sourced from Hootsuite's database. Respondents must work for an organization and be responsible for or have oversight into social media strategy and/or execution.

This report summarizes responses from 9,278 organizations on their use of social media. The study fielded between February and May 2018.

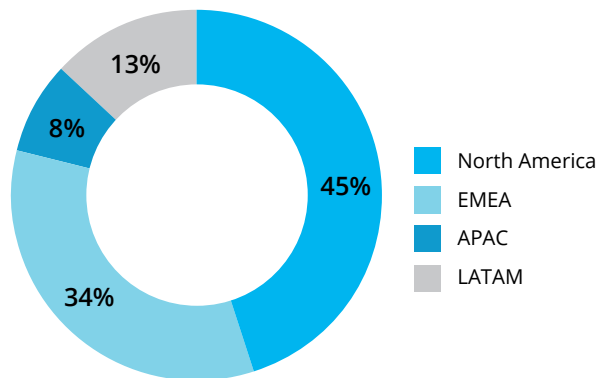
Respondent incentive included a summary of the survey results. This data has not been weighted to be representative of the population of businesses in each country/region. However, sample sizes are robust and the survey provides a valuable snapshot of how organizations around the globe are using social media today.

## Participants per country

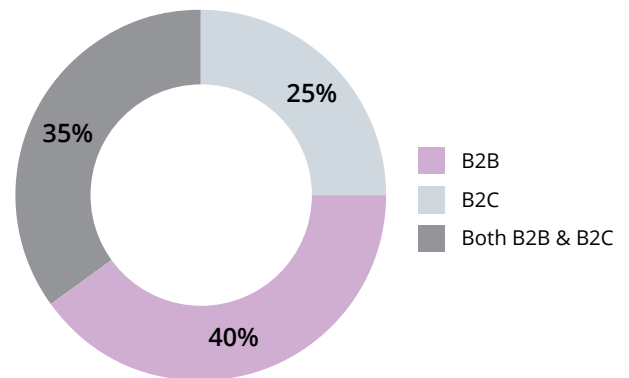


## Respondent demographics

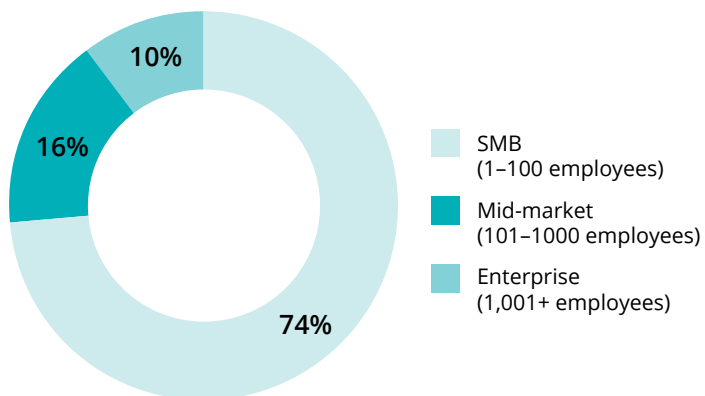
### Participating regions



### Participating customer types



### Participating business size





1

# Social media is more important than ever

**TOTAL GLOBAL INTERNET USERS HAS PASSED THE 4 BILLION MARK**—over half of the world’s population—and the number of social media users has climbed to 3.2 billion.<sup>1</sup>

Social media has never been more important to businesses. And CEOs around the world are taking notice.

## Social media is mission critical—and CEOs agree

Social media is increasingly important to businesses around the world. Eighty-seven percent agree that social media is important to staying competitive, and 80 percent report that social media is more important than it was the previous year.

Social media is particularly important to APAC and NA organizations. Where North America once led the way in social maturity, other regions are catching up fast when it comes to understanding and benefiting from the value of social.

Importantly for budgets in every region, CEOs are putting their weight behind social. Only 28 percent of respondents said it’s a challenge for them to convince their CEO to invest in social.

## Most companies manage social media internally

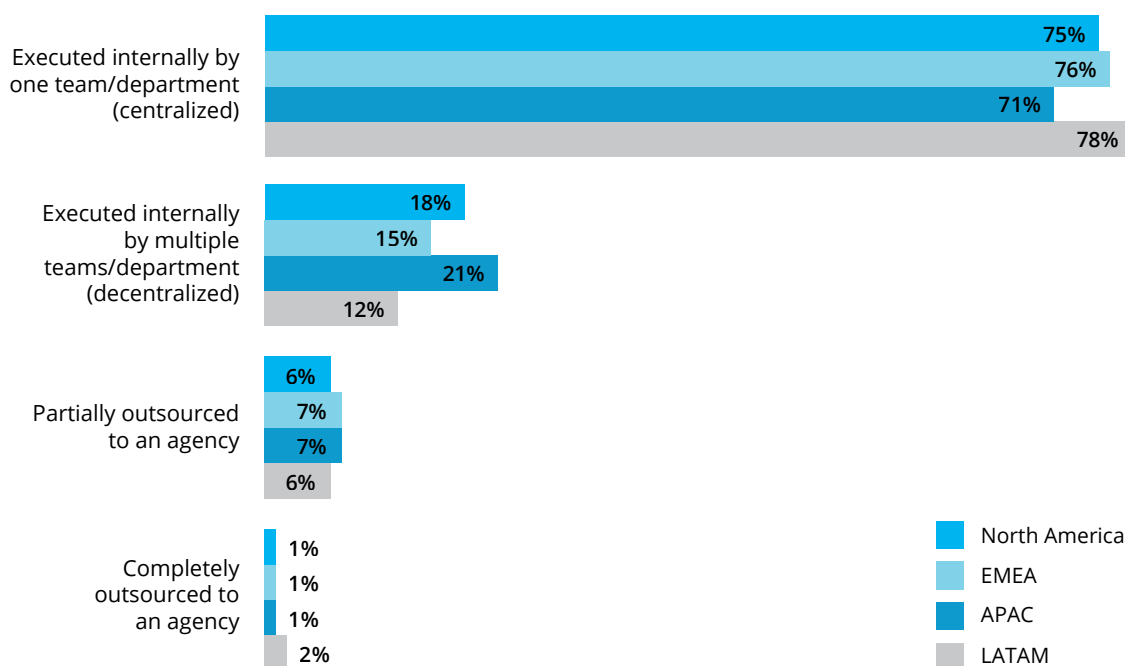
Most organizations prefer to keep social media management in-house, usually run out of one specific team or department.

This aligns with Gartner’s 2016-2017 CMO Spend Survey, which found that marketing budgets are on the rise for the third year in a row, with a greater portion being spent on digital marketing related activities. Gartner recommends that companies “look for outsourced capabilities you can bring in-house to reduce costs and increase internal competencies.”<sup>2</sup>

A few years ago, social was primarily the domain of the marketing department and could be outsourced more easily to a dedicated social agency. With organizations now using social to drive business goals beyond marketing and across departments, bringing it in-house makes good business and operational sense.

The range of social media management platforms and tools, coupled with the availability of training and best practices, enables organizations to build robust and effective internal social media teams. This is consistent across the world, with APAC companies being slightly less centralized.

### How does social media get executed at your organization?



### The bigger the organization, the bigger the social team

The majority of organizations around the world still have just one or two individuals dedicated to social media. However, our survey found a willingness among larger organizations to invest in social and build larger teams.

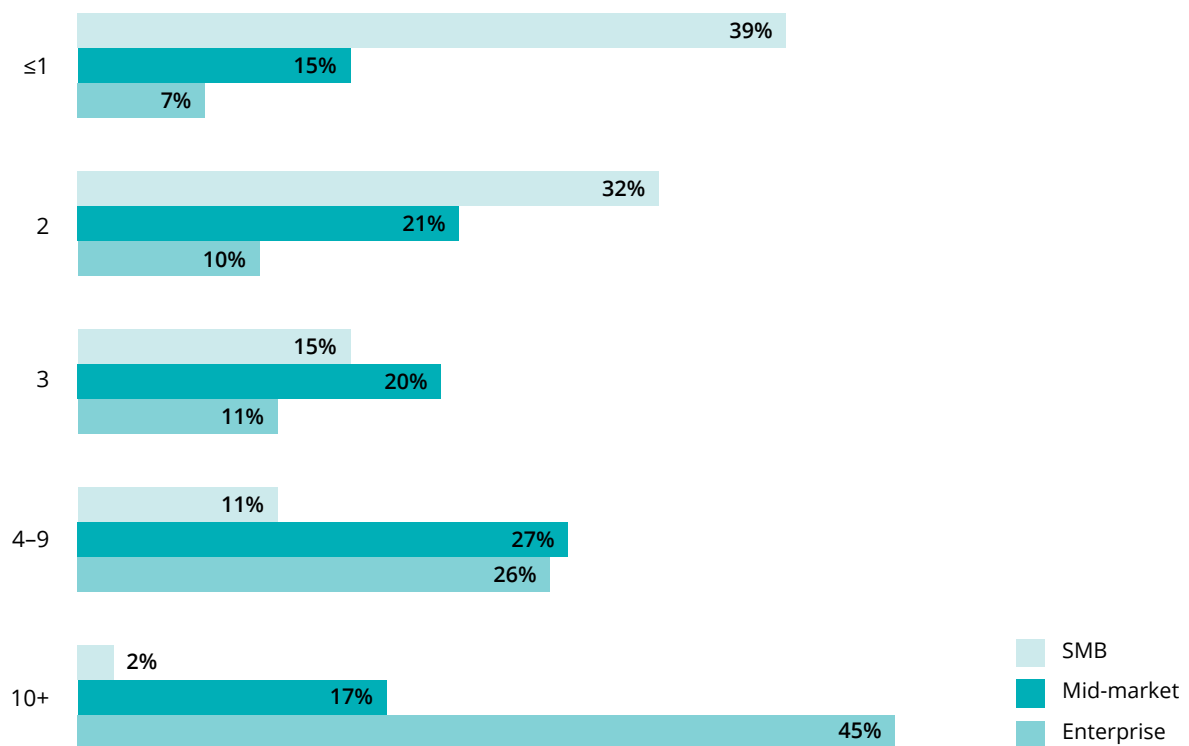
Almost half of enterprise organizations with more than 1,000 employees have more than 10 people dedicated to social. Again, the growth of social across many organizations, and its strategic importance, make allocating the appropriate resources to social a necessity.

According to Forrester,<sup>3</sup> it's also important that these staff don't just sit within marketing (despite the fact that 76 percent of marketers report that this is the case in their organization).

“If your company relegates social media to a purpose-built team without participation from the wider enterprise, this is a signal that you need to start your evolution. You can’t unleash social across your organization if it can’t escape its own pigeonhole.”

—Melissa Parrish, Forrester

### How many individuals at your organization are involved in the execution of social media?





2

## Organizations are more active across more social networks



**SOCIAL MEDIA USE CONTINUES TO RISE**, with an estimated 3 billion people worldwide using social media each month in 2017 (up 13 percent year-on-year).<sup>4</sup>

In a more social world with more users and more networks to choose from than ever, organizations must be strategic about which networks they use—and how they use them.

### Companies are managing large numbers of active social profiles

In response to the continued growth of social, organizations are increasing their social presence.

Around the globe, approximately half of organizations now have between four and 10 active social profiles. Profiles are tailored to specific audience, business, and audience needs such as customer service, regional offices, and human resources.

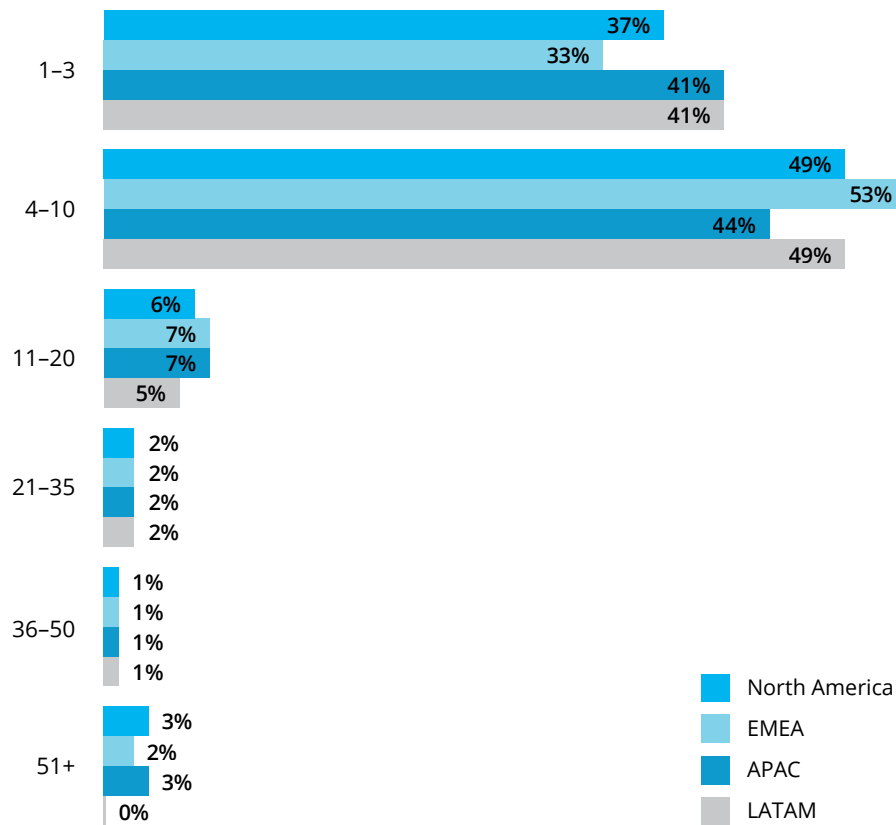
Unsurprisingly, large organizations tend to have a much larger social presence, with 17 percent of enterprise organizations managing 21 or more social profiles.

### Facebook, Twitter, and Instagram are the most used social networks

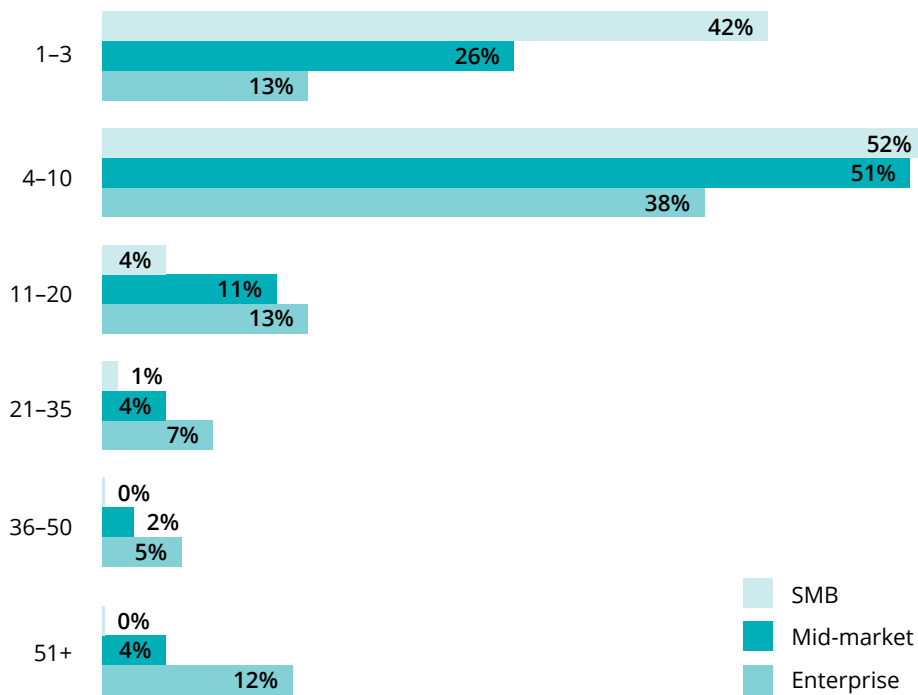
The number of social profiles an organization manages is often tied to the number of social networks they are active on.

Across all regions, Facebook still dominates in organizations of all types and sizes. Ninety-five percent of businesses use Facebook, followed by Twitter and Instagram at 84 percent and 74 percent respectively. LinkedIn (62 percent) and YouTube (61 percent) complete the top five.

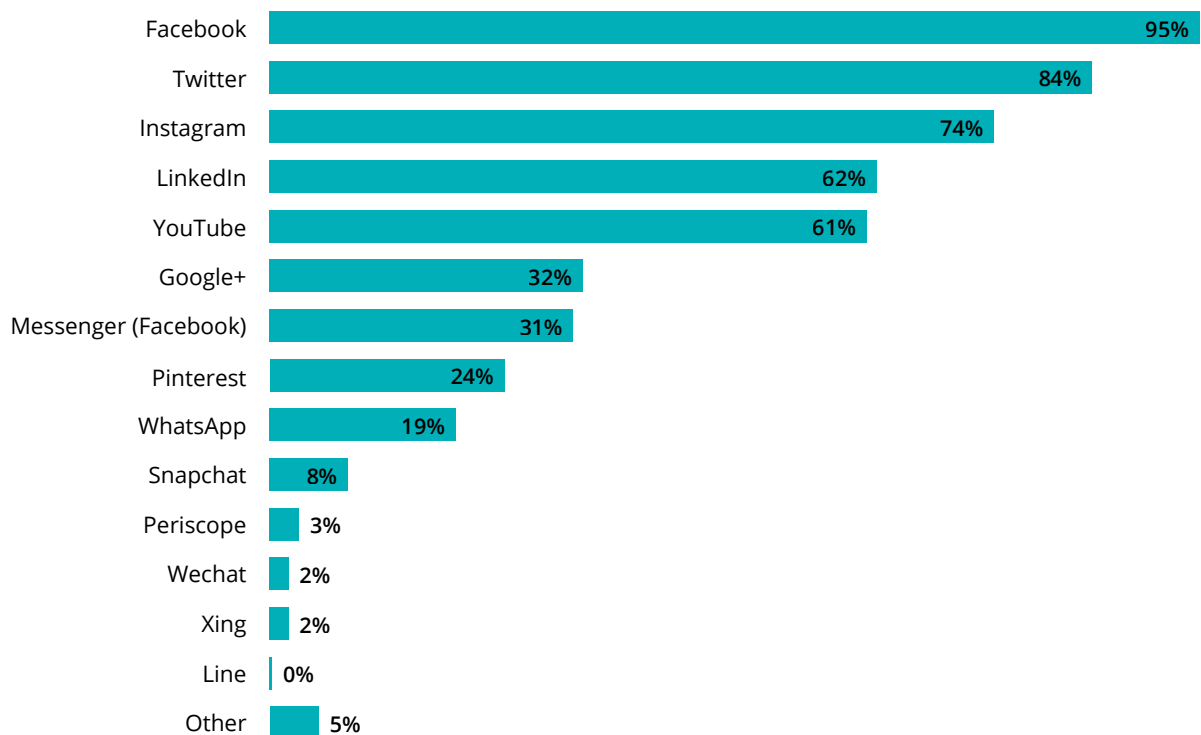
### How many active social profiles does your organization have? (By region)



### How many active social profiles does your organization have? (By organization size)



## What social networks does your organization use?



When a new social network launches or an existing network increases in popularity, social media teams around the world monitor adoption levels and examine the pros and cons of including it in their social strategy. However, most organizations, especially SMEs, have to make sure they don't spread their limited resources too thin.

### WORD OF ADVICE

## Choosing your channel wisely

Organizations must consider several factors when selecting a social network, including:

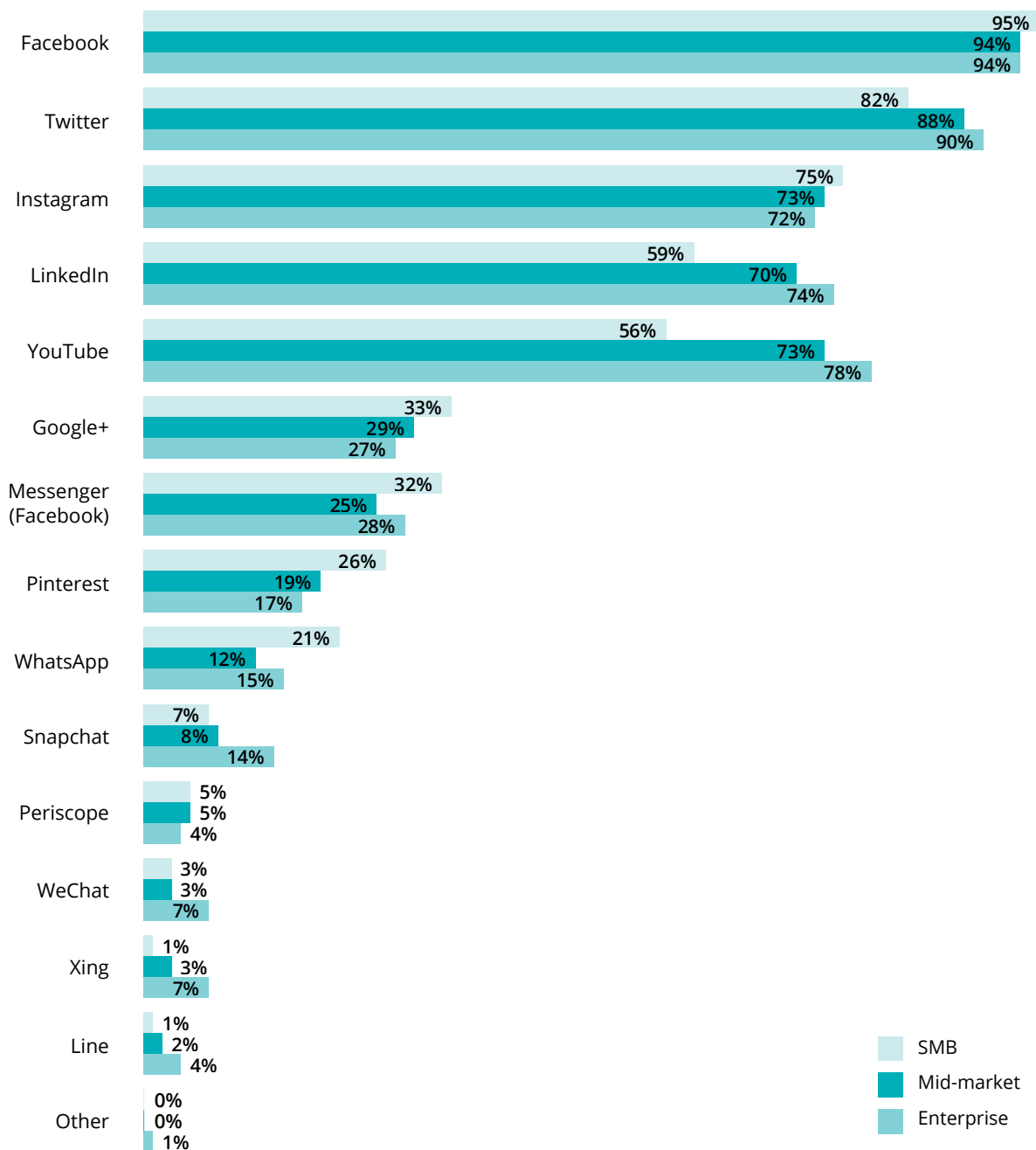
- Does your audience use it, and to what extent?
- Do your competitors use it, and to what extent?
- What resources and budget are needed to maintain an effective presence?
- What are the business benefits of using it?
- Are there any consequences of NOT using it?

As you decide which social channels to use, you will also need to define your strategy for each network. Get our [step-by-step social media strategy guide](#), which includes guides for each network with pro tips on how to grow your social media presence.

From a business perspective, it pays to be strategic about which networks to pour resources into and which ones to use less, or even not at all.

Adoption of a particular network can depend on the size of a business. Midmarket and enterprise organizations are more likely than SMBs to use LinkedIn and YouTube, and to a lesser extent, Twitter. Facebook sees a fairly standard adoption rate across all sizes of organization, reflecting the sheer number and variety of people active on the network—more than 2.2 billion monthly active users.<sup>5</sup>

### What social networks does your organization use? (by organization size)

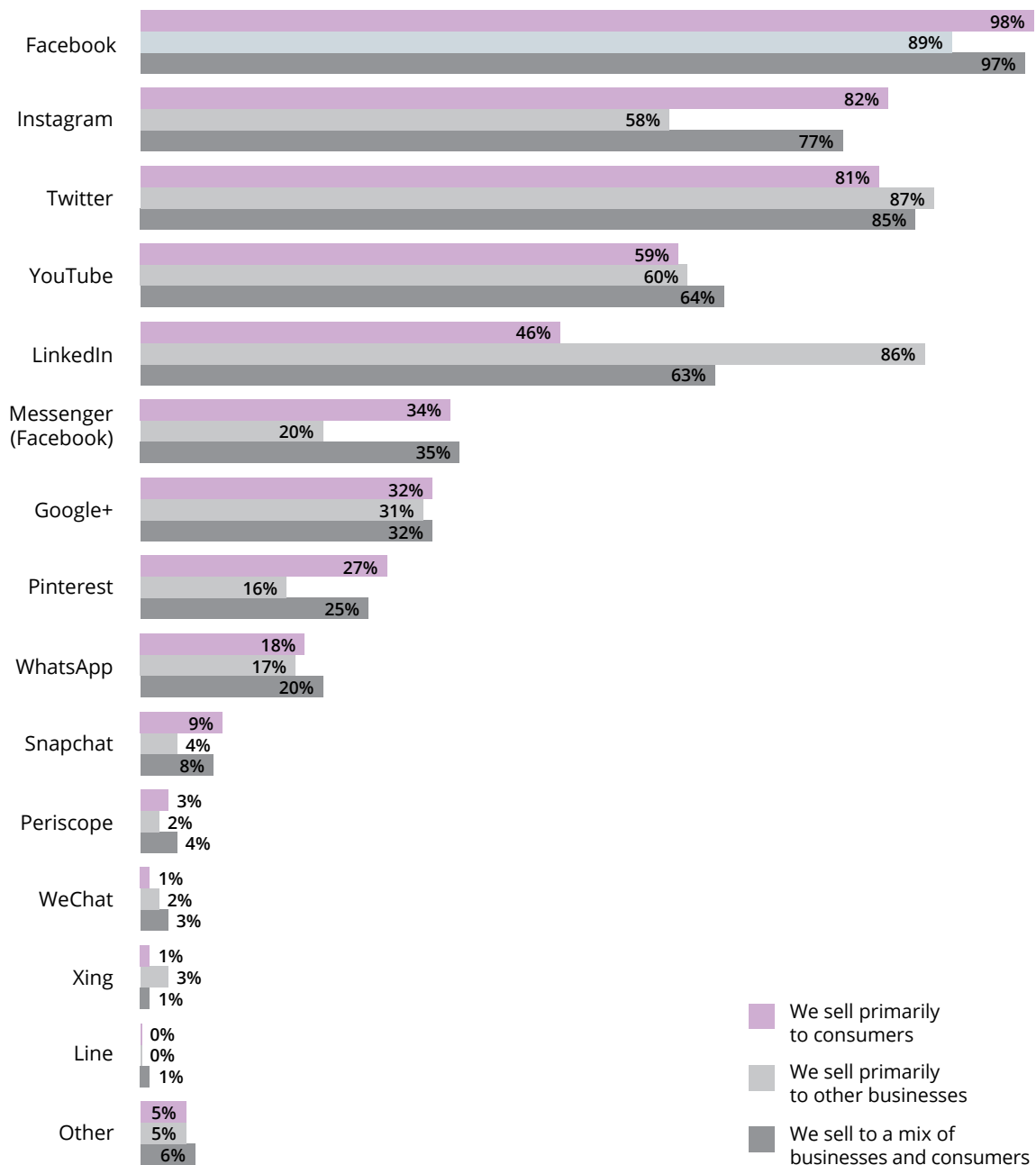


## B2B organizations rely on LinkedIn, while B2C prefer Instagram

Organization size isn't the only factor determining choice of social networks; network preferences differ markedly between B2B and B2C organizations.

Facebook is again the top network across both audiences. Ninety-eight percent of B2C organizations use Facebook, compared to 89 percent of B2B companies.

What social networks does your organization use? (by audience type)



The reasons why Facebook appeals to companies targeting consumers and businesses are clear. The network has an enormous number of users spanning both groups, and the lines between business and personal use are often more blurred than on other networks. In addition, Facebook Messenger has added customer service functionality to the network.

Beyond Facebook, our findings show that audience type plays a role in social network usage. Unsurprisingly, the use of LinkedIn is significantly higher for B2B organizations (86 percent) than B2C companies (46 percent). This reflects LinkedIn's clear positioning as a professional social network, and is further reinforced by LinkedIn (86 percent) edging out Twitter (82 percent) as the second top social network among B2B organizations, and not being far off Facebook (89 percent).

On the other hand, Instagram use is much higher for B2C companies. Eighty-two percent (edging out Twitter at 81 percent) of companies targeting consumers use the image sharing network, compared to just 58 percent of B2B businesses. Organizations large and small enjoy great success with Instagram. However, that success is driven by the ability to create a lot of high-quality visual content.

## Geographic factors and the rise of mobile messaging

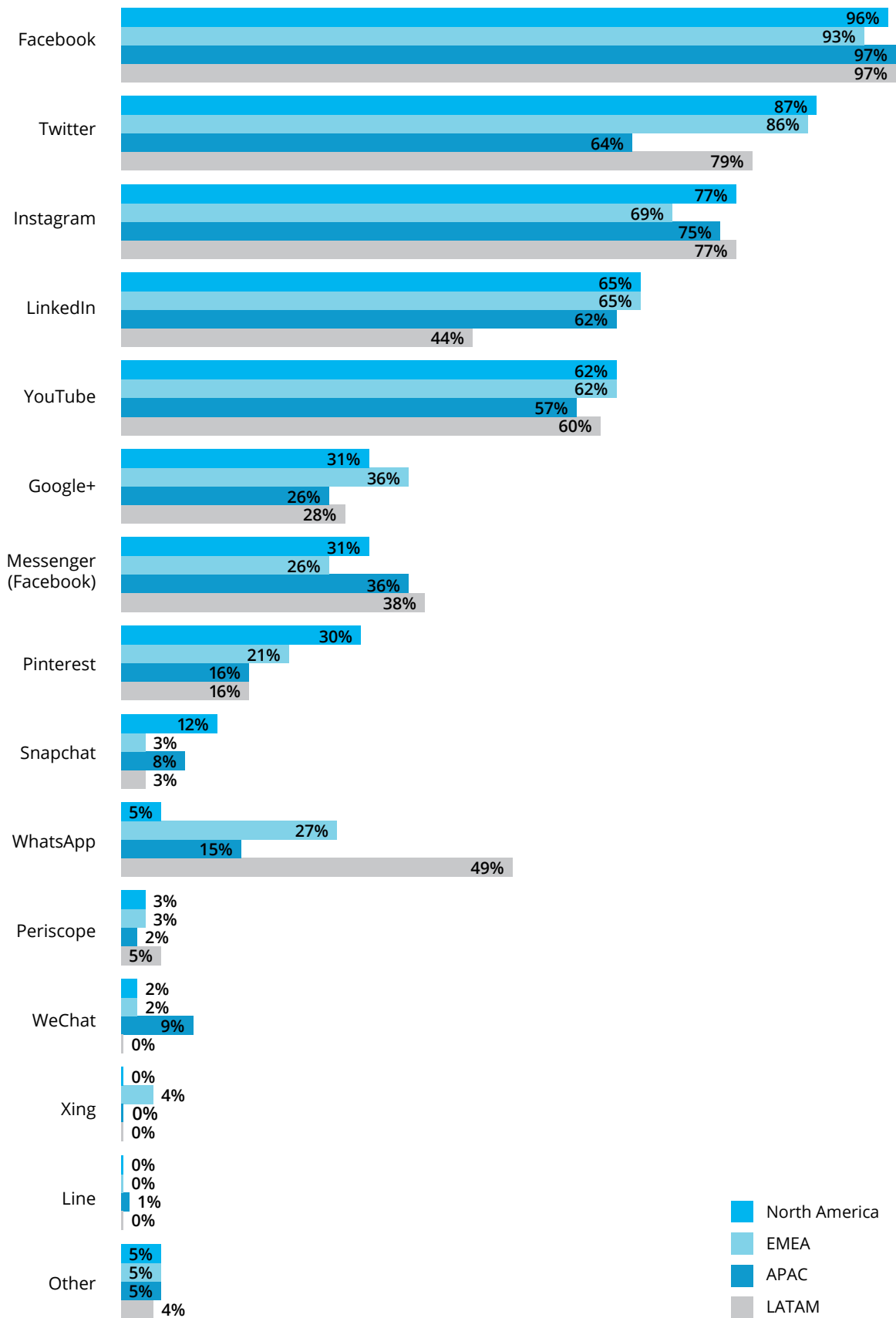
Generally, NA, EMEA, and APAC businesses follow similar trends when it comes to the top five social networks they use. One outlier is Pinterest, which is more popular with companies in North America than the other regions.

However, LATAM's use of LinkedIn is considerably lower when compared to the other regions. And LATAM businesses use WhatsApp much more than businesses in other regions. Overall, the use of mobile messaging apps like Facebook Messenger, WhatsApp, and WeChat is higher in organizations in APAC and LATAM countries than in the rest of the world.

Most of the reasons behind these differences lie in the rise of messaging apps and how social networks often come to serve different purposes in different countries, sometimes for very specific cultural or economic reasons. For example, according to eMarketer, mobile messaging apps took off in APAC and LATAM countries in particular because they are a cheaper option than SMS text messaging.<sup>6</sup>

A 2017 Pew Research Center study found that factors such as smartphone use and the age and economic status of users all affect how widely social media is used in a particular country.<sup>7</sup>

## What social networks does your organization use? (by region)



3

## Social goals are broader—and harder to achieve



### **SOCIAL MEDIA HAS TRADITIONALLY BEEN A RELIABLE TOP-OF-FUNNEL**

activity. Today, we see companies expanding their social presence to include more networks and profiles, and to drive business results across a broad spectrum of initiatives beyond marketing.

However, many companies don't yet have the right social programs in place—such as social selling—to fully support their broader business goals.

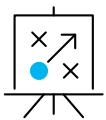
### **Driving reach and engagement are still the top social goals**

While social can support the full marketing funnel, most businesses still turn to social to primarily help them meet top-of-funnel goals and drive reach and engagement.

Ninety percent of organizations make building brand awareness a priority for social, with 77 percent using social to manage brand reputation and 71 percent engaging with their audience online through social media.

These goals have driven social strategies since the early days of social media, and most organizations are now successful in using social to achieve them.

A growing number of businesses are now looking to social to achieve bottom-of-funnel business goals, such as revenue. Sixty-one percent of organizations now use social to increase conversions and sales.



54%

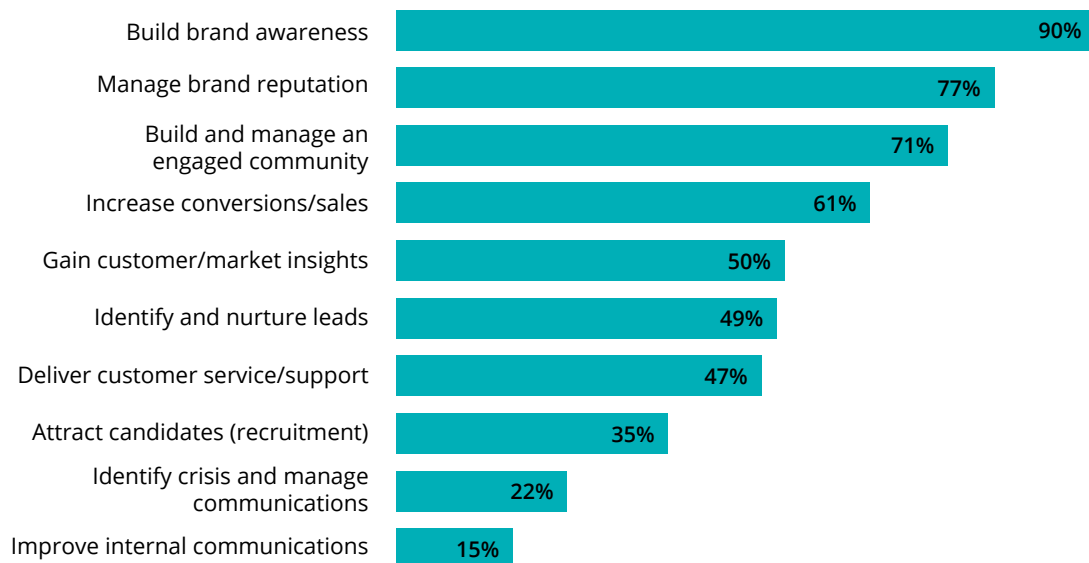
of organizations state that more and more departments, beyond marketing, are using social media.

67%

of respondents agree that social media will increasingly contribute to a company's bottom line.



## Which of the following goals is your organization trying to achieve with social media?



## Social media is much more than a marketing channel

As social works its way down the marketing funnel, organizations are using social to support initiatives beyond marketing.

Our survey highlighted an increase in social media use in three areas, each with different—and specific—goals:

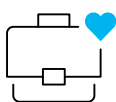
- **Sales:** Identifying and nurturing leads
- **Customer support:** Delivering customer service
- **HR:** Attracting candidates

Social selling is a great example of a social program that can have an impact lower down the marketing funnel. Social selling is the practice of using social media to help salespeople engage with prospects to build rapport and trust throughout the customer journey.

According to Forrester, “B2B marketers now rank social over email as a preferred demand management tactic. In time, expect to see social as a top channel for marketing, sales, and buyer interaction across the entire life cycle.”<sup>8</sup>

Enterprise companies are more likely to use social across their organization. Forty-nine percent use social to identify and nurture leads, and 50 percent use it to gain customer insights for improved CRM.

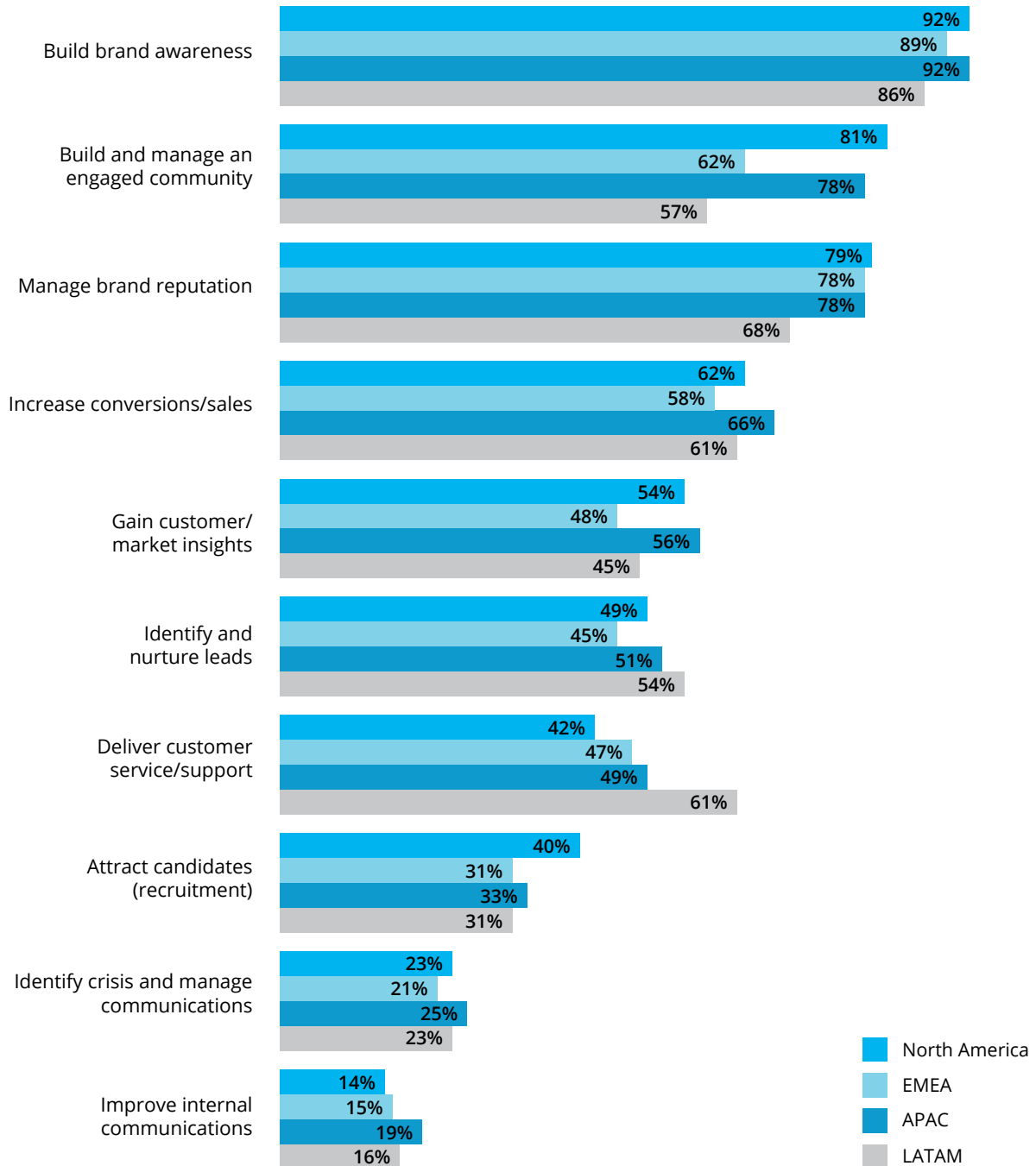
Forty-seven percent deliver customer service through social, while 35 percent use it to help recruit employees, and 15 percent use it for internal communications.



Learn how to incorporate social media into your sales process more effectively. Download Hootsuite's [Social Selling Toolkit](#) to help you close more deals—and better serve your customers.

Usage is broadly consistent across all regions with the exception of LATAM, where organizations are more likely (61 percent) to use social media for customer service. This aligns with the region's higher use of mobile messaging and its focus on direct communication between businesses and customers.

### Which of the following goals is your organization trying to achieve with social media? (by region)

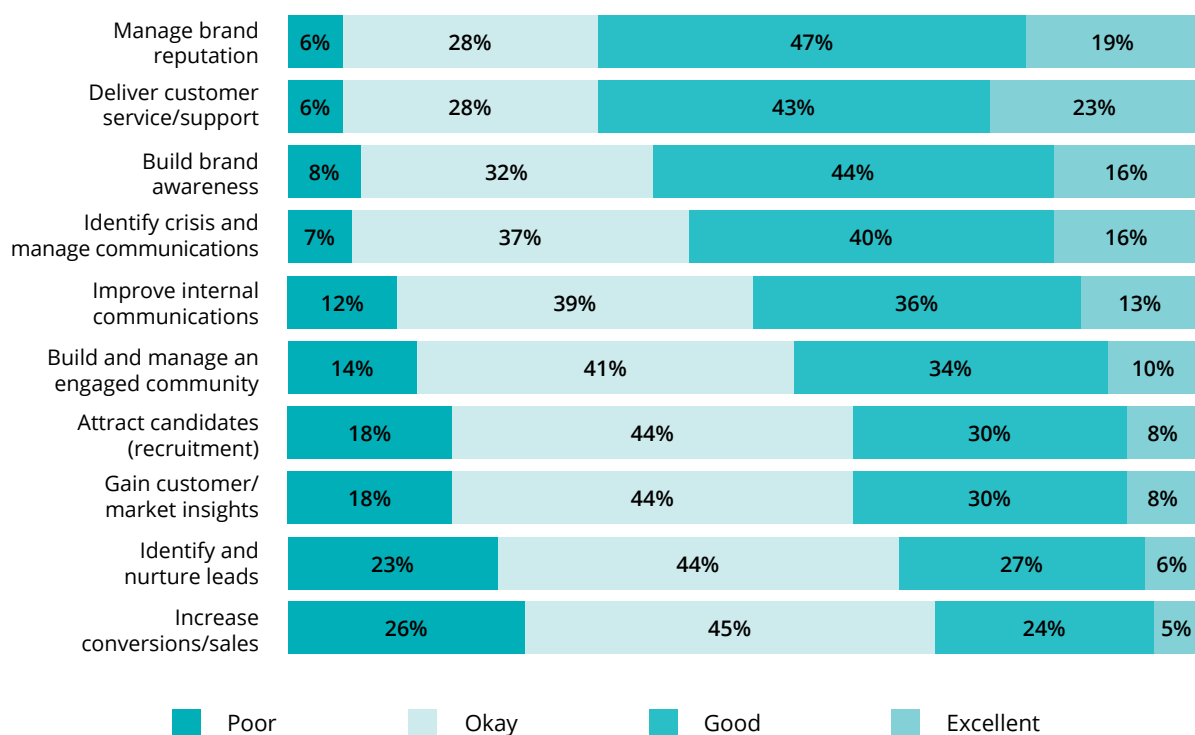


## Social media results show room for improvement

When asked how well they are meeting their social media goals, just under two-thirds of organizations rate themselves positively. This includes the top goals of building brand awareness and managing brand reputation, despite the fact that businesses see social working best in these areas.

For objectives beyond marketing, such as improving internal communications, less than 20 percent rate their performance as “excellent.”

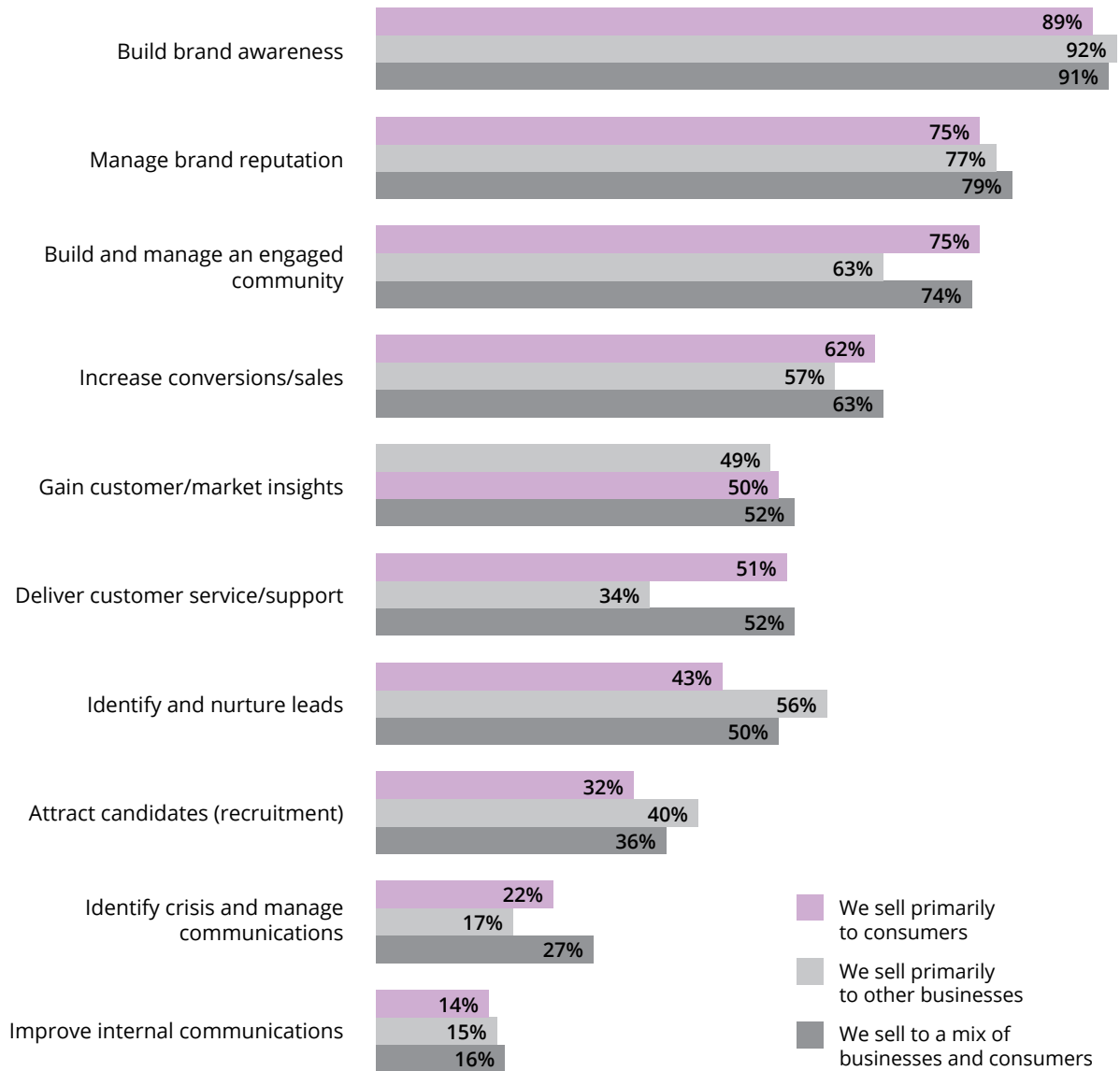
### How well is your organization doing at meeting these goals with social media?



Evidently, organizations are still struggling to realize their business goals with social media. While social is delivering adequate returns when it comes to primary top-of-funnel marketing goals, there is clearly room for improvement down the funnel and beyond core marketing objectives.

When it comes to priorities, B2C companies report being more focused on building an engaged community and delivering customer service via social, while B2B organizations prioritize driving sales and conversions through identifying and nurturing leads on social.

## Which of the following goals is your organization trying to achieve with social media? (by audience type)



Regionally, LATAM organizations with sales-related goals rate their social media performance more positively: 49 percent versus 31 percent for identifying and nurturing leads, and 41 percent versus 27 percent for increasing sales and conversions.



46%

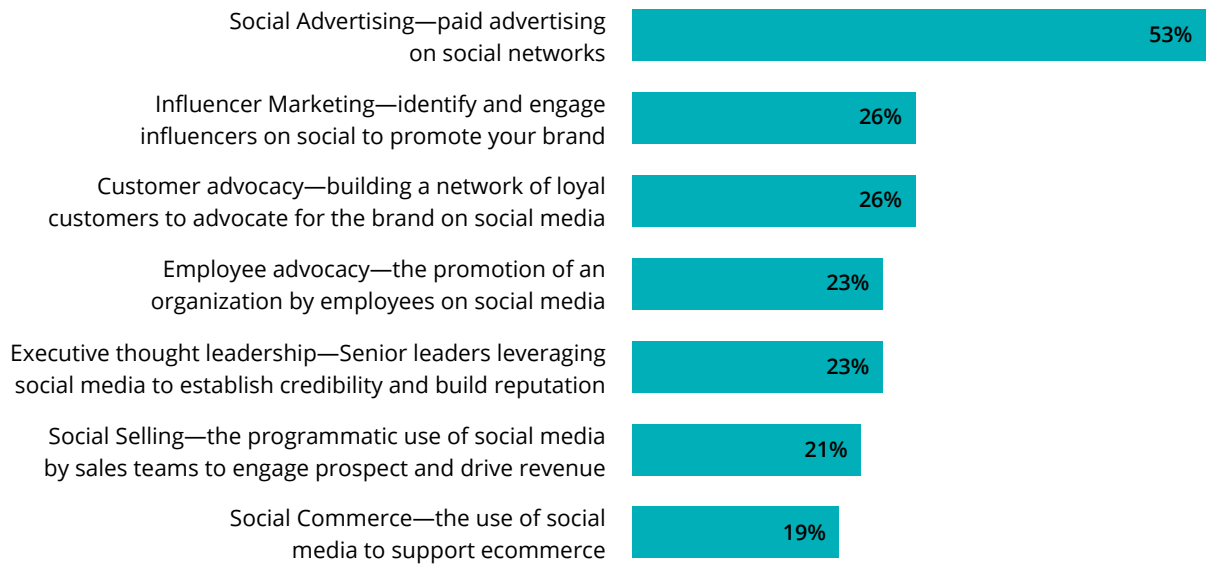
of organizations encourage employees to use social media for business purposes.

## Many social media programs are still in their infancy

There is still a gap between some organizations' social goals and what they can realistically achieve without further investment in social media.

For example, even though 49 percent of organizations point to identifying and nurturing leads on social as a goal, only 21 percent have adopted social selling programs.

### Which social programs has your organization implemented?



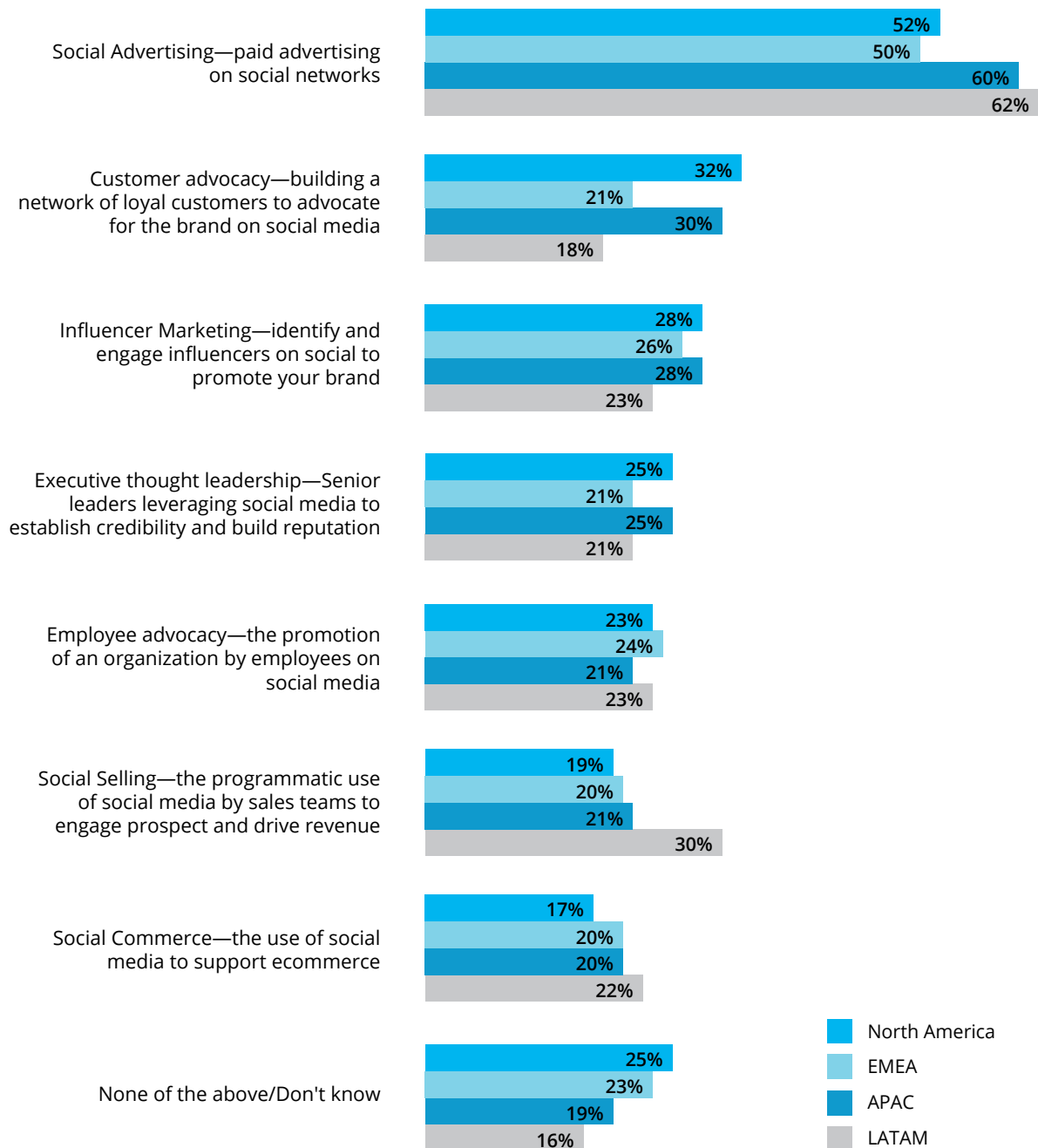
[Download this ebook](#) with tips to strategically optimize your Facebook ad campaign—and ensure you maximize every dollar spent.

Social advertising is the most popular program. In an environment of changing algorithms and declining organic reach, social advertising continues to enable organizations to build brand awareness and strengthen customer relationships on the largest social networks.

Some organizations are also getting more creative in how they use social to connect with audiences through influencer marketing, employee advocacy, executive thought leadership, and other approaches.

Regionally, North America and Asia Pacific lead the way when it comes to customer advocacy programs, while more LATAM companies have adopted social selling than in other regions. Again, this can be partly attributed to the higher use of mobile messaging in that region, which increases the volume of direct communication between businesses and customers—resulting in more social selling opportunities.

## Which social programs has your organization implemented? (by region)



## 4

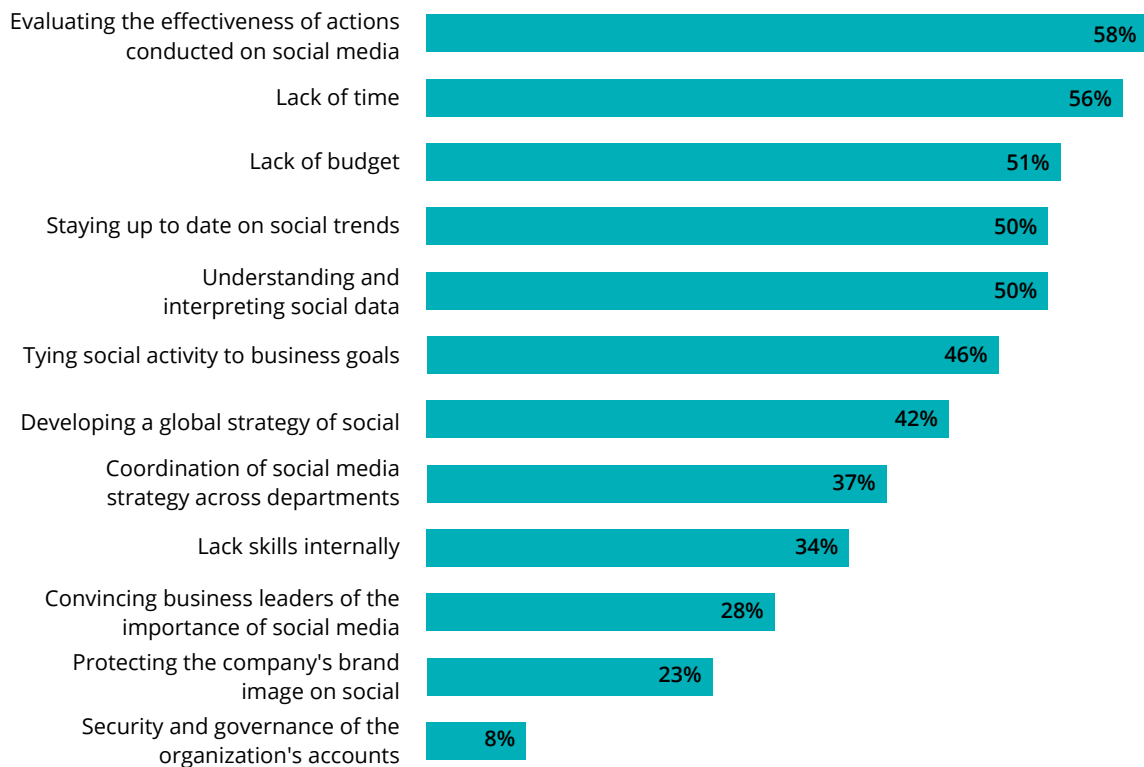
# Organizations face multiple challenges with social



## ORGANIZATIONS STILL FACE MULTIPLE CHALLENGES IN

achieving success with social media. We broke our findings down into the four main social media challenges facing companies today.

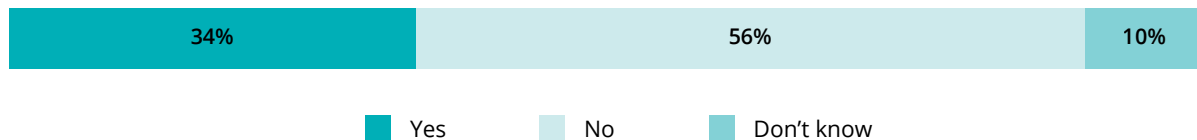
### Select the challenges your organization faces with social media



## Challenge 1: Measuring return on investment in social

Evaluating the effectiveness of social media investments was a top challenge. Fifty-eight percent of respondents find it difficult to say whether or not their social media campaigns are working, while 50 percent struggle with understanding and interpreting social data. Only 34 percent of organisations report that they measure social ROI.

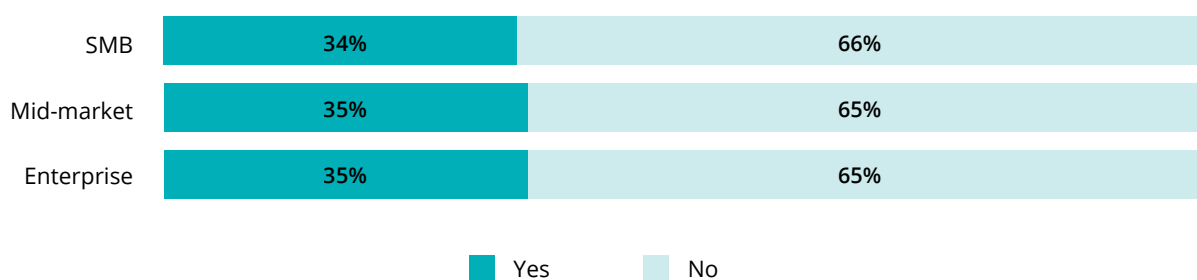
### Does your organization measure the return on investment of social media?



Organization size does not appear to play a significant role in whether or not it measures social ROI.

Clearly, many organizations need to improve at measuring and interpreting their social data. An effective measurement framework doesn't just help teams build a case for greater investment in social media and specific social media programs, but can also boost the effectiveness of social initiatives.

### Does your organization measure the return on investment of social media? (by organization size)



## Challenge 2: Integrating social media across the organization

With social media playing a growing role in initiatives beyond core marketing goals, organizations are experiencing challenges in effectively coordinating larger and more distributed social teams, and in managing a growing number of social profiles.

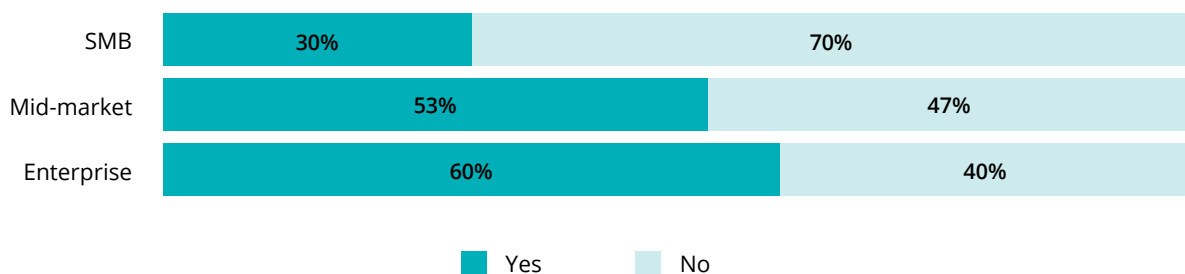


Forty-two percent of respondents report finding it challenging to effectively coordinate social strategy across multiple departments—and in enterprise organizations, that number rises to 60 percent.

Our findings across all regions reflect a lack of coordinated social media strategy and collaboration across departments. Forty-two percent of companies find developing a global strategy a challenge, while 46 percent struggle to tie social to business goals and 37 percent experience poor cross-department coordination.

While social media is still managed centrally, most of the resources and expertise can be found within just one team. Larger organizations are less likely to centrally manage all of their social activities, giving departments more control over how they use social for their own purposes and objectives.

### Agree coordination of social media strategy across departments is a challenge



Companies need to take a collaborative approach and adopt a coordinated social strategy that ensures a consistent approach to social media governance, content creation, campaign execution, measurement, and other social priorities. This is especially true for larger enterprise organizations.



Hootsuite's industry-recognized [Social Media Marketing Courses and Certifications](#) enable marketers to develop practical social marketing skills, grow followers, engage audiences, and deliver business results.

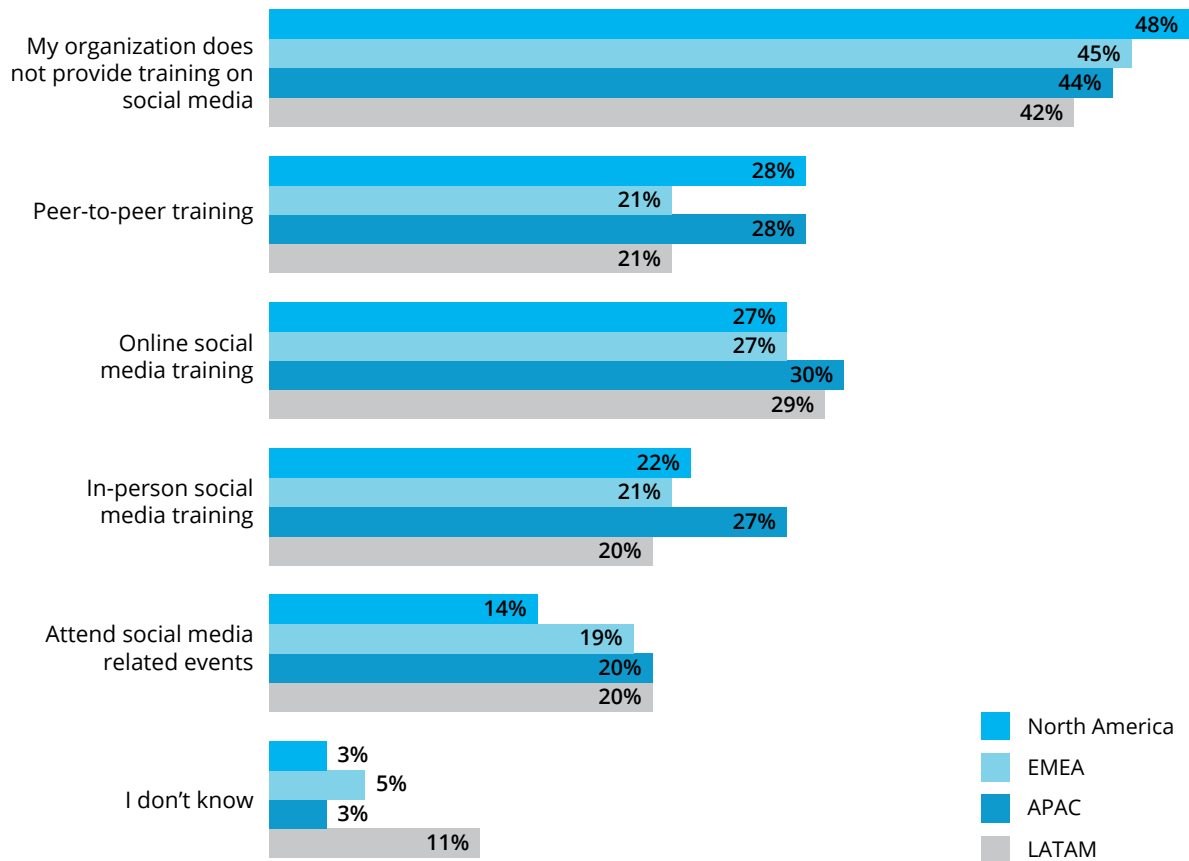
### Challenge 3: Training and governance

Training social media team members is a challenge for many organizations. Thirty-four percent of respondents say they lack adequate social media skills in-house—yet 46 percent admit they don't provide staff with any social media training at all.

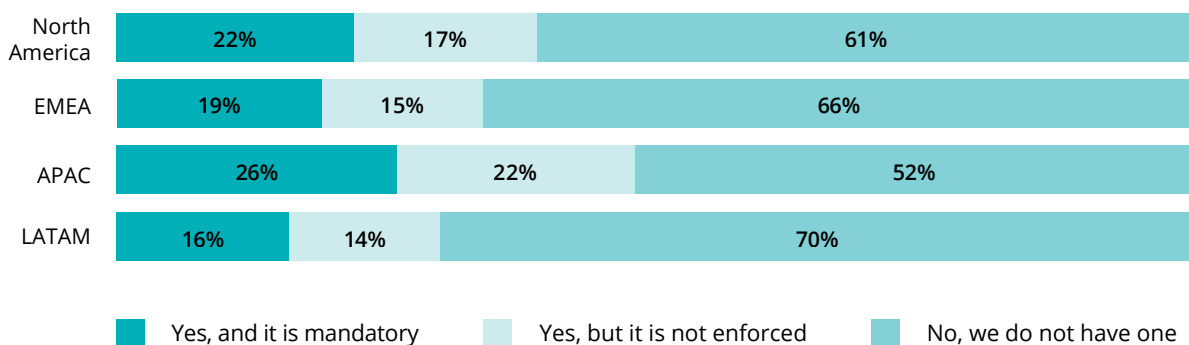
When training does take place, companies typically deliver it through a mix of formal online training and more informal, peer-led training. Almost two thirds (63 percent) of organizations don't have any policies in place to govern employees' use of social media.

The lack of training provision is consistent among organizations globally. Companies that are committed to unlocking the value in social media must address this lack of training, particularly in key areas such as social analytics and measurement. This will help organizations evaluate social programs better to refine and improve them, as well as to build a business case for continued and increased investment.

## How does your organization train employees on social media?



## Does your organization have a formal policy governing its employees use of social media?



## Challenge 4: Time and resources

Everyone who has worked in any department will be familiar with grumbles of not having enough time or money to get things done.

Social media is no different. Fifty-six percent of organizations report being strapped for time when it comes to managing social effectively, while 51 percent say their social media budget could be better.

With companies finding it a challenge to measure social ROI, it's no surprise that it's also difficult to convince executives to allocate more budget and resources to social media teams.

As we've seen, declining organic reach across some social networks is highlighting the importance of social advertising and high-quality content in enabling organizations to maintain an effective presence on social. These initiatives take time and money to achieve, especially given the increased number of social profiles and channels to manage, monitor, and supply with content.

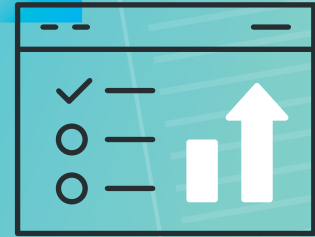
While budgetary challenges are consistent globally, there are small regional differences when it comes to time management. Lack of time is seen as a bigger challenge for companies in North America than in other regions, especially APAC and LATAM.

### Organizations reporting lack of time for managing social effectively (by region)



# 5

## From challenges to opportunities



### IN 2018, NORTH AMERICA NO LONGER LEADS THE WAY.

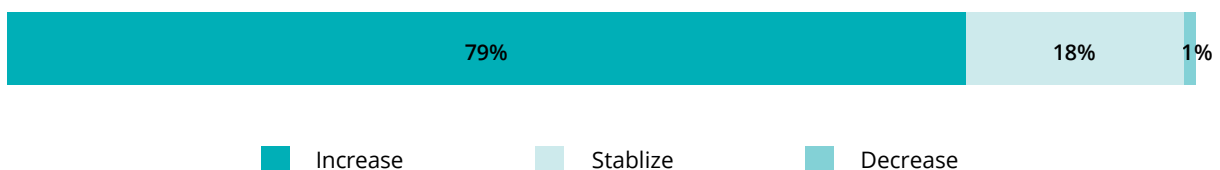
Social media is increasingly important to organizations around the world—and across all regions, organizations consistently report a common set of social media goals and challenges.

Organizations are using social media to support initiatives beyond marketing in areas such as sales and human resources. They want to do more with social, but that takes time, budget, and training.

Teams looking to increase budgets face a particularly paradoxical challenge: While many lack the skills and tools to measure and prove return on investment in social media, they must demonstrate social ROI to build a business case for continued and increased investment.

Yet despite these challenges, the future of social media looks bright for most organizations. Eighty percent report that social media is more important to their organization than it was last year, and 87 percent recognize the need to maintain a presence on social media in order to stay competitive.

### Do you expect your organization's use of social media to increase, stabilize, or decrease?



## Steps to competitive advantage through social

Looking ahead, organizations seeking a competitive advantage through social will do well to focus on the following core strategic priorities:

- Establish an organization-wide social media strategy and governance policies to manage growing—and increasingly distributed—social teams
- Set clear, strategic, and measurable organizational goals for social media initiatives
- Allocate sufficient budget, training, and resources to manage an increasing number of social profiles and programs
- Measure social ROI to evaluate program success, improve outcomes, and build a business case for continued and increased investment in future

With the right tools, teams, and resources in place—and a measurement framework to evaluate and communicate results—organizations can continue to scale up social activity and meet current and future social challenges.



Read our comprehensive guide—[The ROI of Social Media](#)—to discover how to contextually define the ROI of social media, choose the best metrics to measure, and prove success in a way that speaks to your entire organization.

## How do you prove the ROI of social?

Discussions about the ROI of social media often stop being productive when an organization can't get past the question of how to translate social media activity directly into financial results.

Turning gut feelings into indisputable data is a challenge all social marketers face.

To confidently prove the connection between social media activities and an organization's financial goals, you need a new definition for the “ROI of social media,” a measurement framework that fits your organization, and a platform that can help you turn hard data into actionable insights.

## Endnotes

- 1 Hootsuite and We Are Social. [Digital in 2018](#). 2018.
- 2 Gartner. [CMO Spend Survey 2016-2017](#). 2017.
- 3 Forrester. [Everyone Uses Social; Few Know If It Works](#). 2017.
- 4 Hootsuite and We Are Social. [Digital in 2018](#). 2018.
- 5 Facebook Newsroom. [Company Info: Stats](#). 2018.
- 6 eMarketer. [More Than a Quarter of the World Will Use Mobile Messaging Apps by 2019](#). 2016.
- 7 Pew Research Center. [Not everyone in advanced economies is using social media](#). 2017.
- 8 Forrester. [New Tech: B2B Social Selling Tools, Q1 2018](#). 2018.

# About Hootsuite Enterprise

Partner with Hootsuite to accelerate your social transformation



Hootsuite is the most widely used platform for managing social media, loved by over 16 million people around the globe and trusted by more than 800 of the Fortune 1000. Hootsuite Enterprise empowers organizations to execute business strategies for the social media era and scale social media activities across multiple teams, departments, and regions. Our versatile platform supports a thriving ecosystem of social networks complemented by 250+ business applications and integrations, allowing organizations to extend social media into existing systems and programs.

Along with our channel and agency partners, we help organizations build deeper relationships with customers, stay connected to the needs of the market, grow revenue, and draw meaningful insights from social media data. Innovating since day one, we continue to help organizations pioneer the social media landscape and accelerate their success through product training, group training and tailored organizational training, as well as security and compliance services.

Request a custom demo today by visiting [hootsuite.com/enterprise](https://hootsuite.com/enterprise).

Trusted by over 16 million customers

