

**RSW/US**

Agency-Client Relationship Experts

Survey of the  
Social/Digital Landscape  
Marketer and Agency Perspective



## **Background**

The purpose of this study is to help us understand how clients (Marketers) perceive and are using the social/digital space – and evaluate the degree to which Ad Agencies (including digital firms) and PR Firms are doing an acceptable job of servicing their clients (as reported by marketers themselves).

Our hope is that the following key findings and implications from this study can be of value to you as you build, or work to improve your own digital/social media practice.

Overall, there appear to be some very clear and present opportunities for marketing service firms (both Advertising and PR alike) to improve upon the value of what they offer clients in the social/digital space, and an opportunity to help clients better “activate” their social/digital programs – so they can more effectively deliver on the brand and business goals of their clients’ organizations.

The samples came from databases of 6,000 marketing service companies ranging in size from under \$5M in capitalized billings to over \$50M.

The Marketer sample came from our RSW/US database of well over 15,000 client contacts. Client company size varied significantly. Some companies were very large (\$1B+, like Ford, Abbott, and Kraft), others were mid-to small size players like Frisch’s, FLOR, and The Sports Authority.

In an attempt to add value and help you improve your own efforts as you work to plan for 2010, we have prepared an overall executive summary for ease of reference and perspective/implications relative to some of the key results in the study.

If you would like to reproduce any of our findings in any format whatsoever, please give us a call (513-559-3101) or drop us a line. If you would like to discuss any of the information below, please feel free to reach out: [mark@rswus.com](mailto:mark@rswus.com).

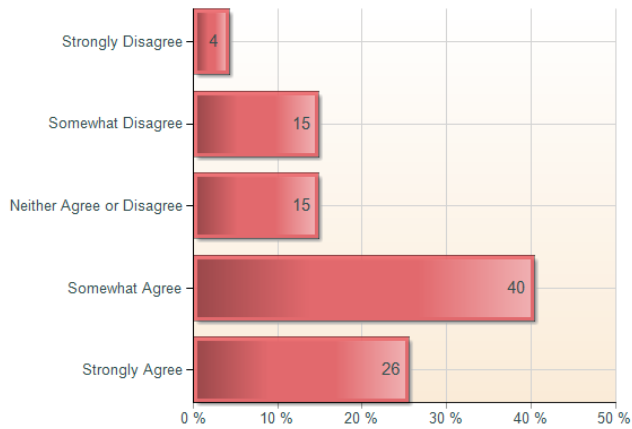
If there is any interest in talking with RSW/US about how it can help you build a stronger lead generation/business development program, which includes creating a stronger social/digital program of your own, feel free to give us a call.

**Executive Summary/Overall Survey Implications**

- Overall, Ad Agencies and PR Firms feel they are on the “cutting edge” of social/digital technologies and offerings, thus maximizing their client’s presence in this space. Both groups rate their social/digital prowess high, with 66% of Ad Agencies and 78% of PR Firms either “somewhat” or “strongly” agreeing that their agency is on the cutting edge.

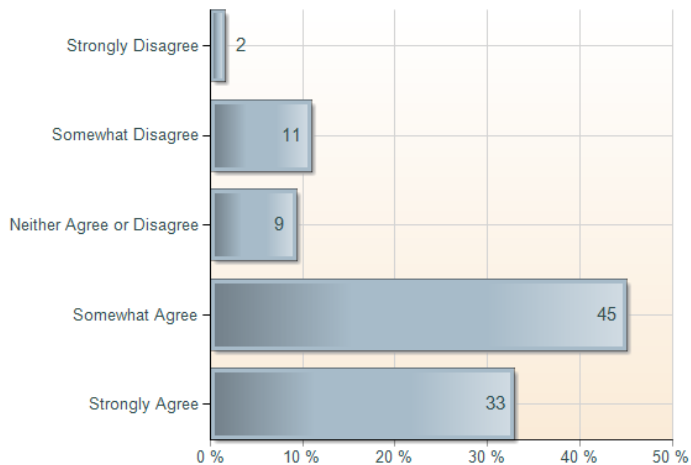
**Ad Agencies**

How strongly do you agree or disagree with the statement: **My agency is on the cutting edge of understanding, working with, and maximizing my client’s presence in the social/digital media space.**



**PR Firms**

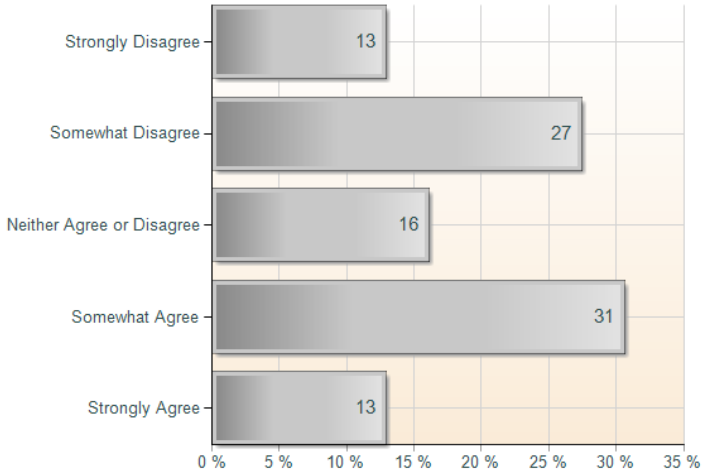
How strongly do you agree or disagree with the statement: **My agency is on the cutting edge of understanding, working with, and maximizing my client’s presence in the social/digital media space.**



- Unfortunately, Marketers don't feel like they are being given the resources by their marketing services firms to be on the "cutting edge". Only 44% of Marketers believe that they are on the cutting edge of these new mediums, thus they don't feel like they have been well enabled to maximize their company's presence in this new space.

**Marketers**

How strongly do you agree or disagree with the statement: **My company is on the cutting edge of understanding, working with, and maximizing my company's presence in the social/digital media space.**



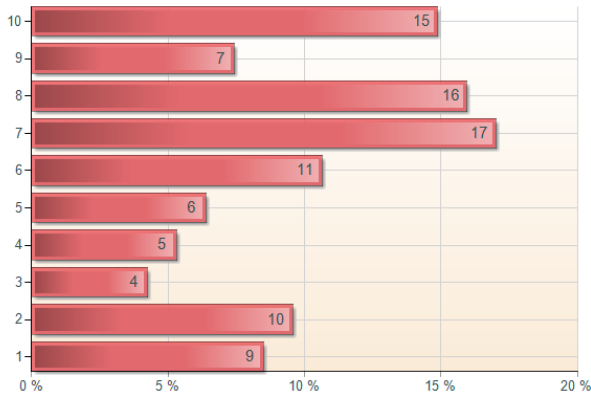
**Implications:** Big opportunity and big watch out for marketing services firms. While I'm certain most know how to build a blog, start a Facebook account, place banner ads and tweet, it's possible that the big discrepancy here is driven in large part by the fact that this may be all many marketing service firms know – and Marketers simply may be looking for something more. When we reach out on behalf of our marketing services clients, we see it. Marketers are looking to not just know the tactics, but understand the strategy and want to be shepherded through the maze in a way that makes good business sense. We suspect, to the Marketers, "maximize my company's presence" isn't just helping them build it, it involves helping them manage it and what I like to call "activate" it. Activating the mediums means figuring out how to best integrate it with other mediums, how to best plan these new channels (and track their success), how to use these channels to drive sales and build the brand. Agencies might think that because they know how to do "it", they are maximizing their client's potential, but in reality it appears that they need to be carried beyond to the next level of this social/digital media game.

We are seeing this manifest itself in the advent of firms that do nothing but plan strategy and help Marketers navigate and measure the success of social/digital. Not sure that long-term there is going to be a place for firms that only do this, but in the short-term Marketers are going to look to these kinds of enterprises if traditional Ad Agencies and PR Firms can't effectively fulfill these needs.

- The same difference in opinion holds true when asking Ad Agencies and PR Firms about the degree to which they perceive they are actively supporting their clients with social/digital programs. 55% of Ad Agencies and 66% of PR Firms state that they are “very active” (7+ on 10 point scale) supporting their clients with social/digital programs. This compares to only 38% of Marketers feeling they are being actively supported.

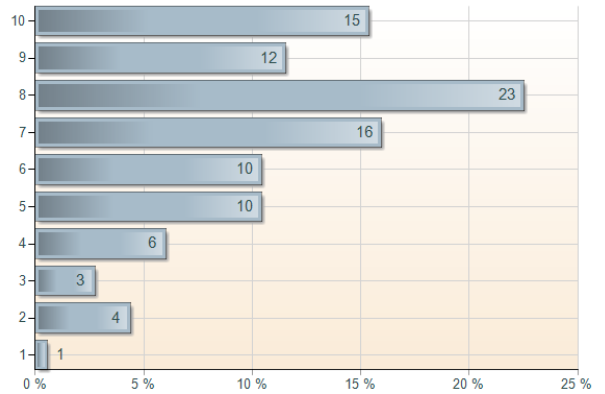
**Ad Agencies**

To what degree are you supporting your clients with social/digital media programs? (1=Not providing these services at all - 10=Very active at providing these services)



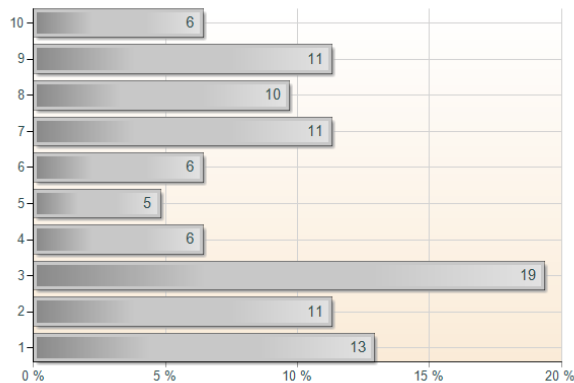
**PR Firms**

To what degree are you supporting your clients with social/digital media programs? (1=Not providing these services at all - 10=Very active at providing these services)



**Marketers**

To what degree are you being supported by outside agencies with social/digital media programs? (1=Not supported at all - 10=Very actively being supported)



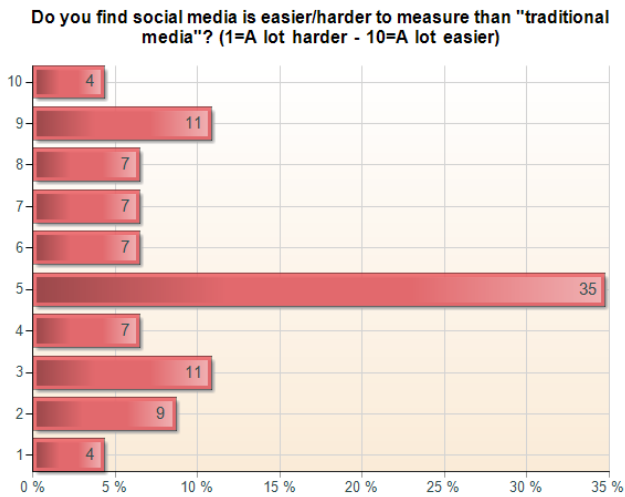
**Implications:** For your existing clients, if you want to get involved in social/digital media - take the lead. If you aren't talking about it (and want to), get on it (quickly). And when you do talk social/digital media, don't just talk about these elements as tactics, discuss how you can help your clients effectively integrate these media with other mediums, talk about how you can fashion a strategy for social/digital that will help the client's business and brand grow, and share with them ideas on how to effectively measure this space.

When presenting to new clients, juxtaposition yourself with other firms and suggest that it's more about just having, it's about doing and activating.

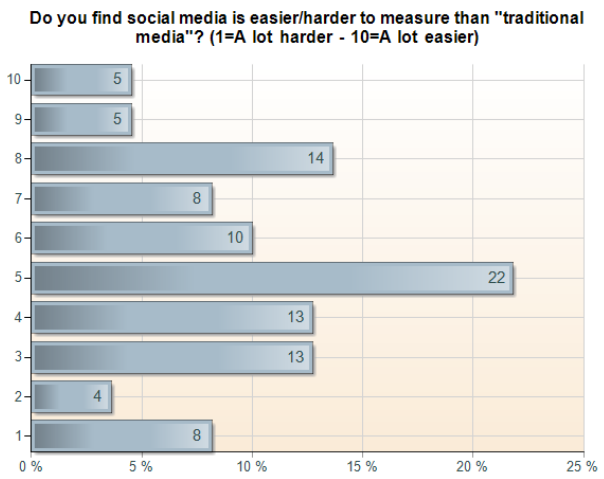
And please, create a program for yourself (and stick with it). The last thing you want to do is talk the talk, but not be playing in the space yourself.

- Helping clients understand how you can measure, or how you plan to measure the effectiveness of social and digital media will help address what appears to be a need/gap among Marketers. 61% of Marketers feel that measuring social/digital is harder than measuring the effectiveness of traditional media (rating a 4 or below). Ad Agencies and PR Firms don't seem to share that same sentiment. They don't see it as being as hard, rating the same question at 31% and 38%, respectively.

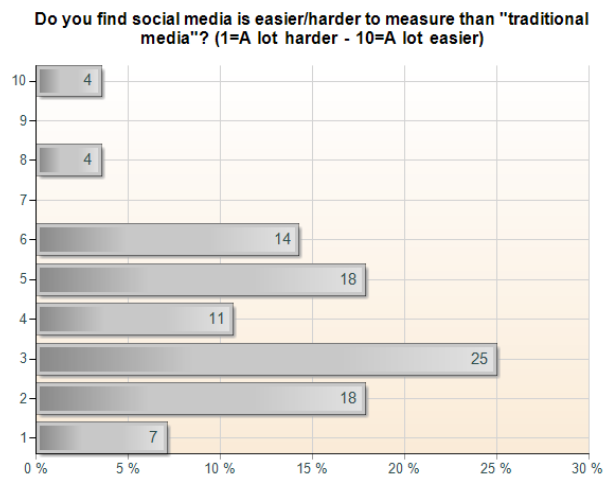
**Ad Agencies**



**PR Firms**



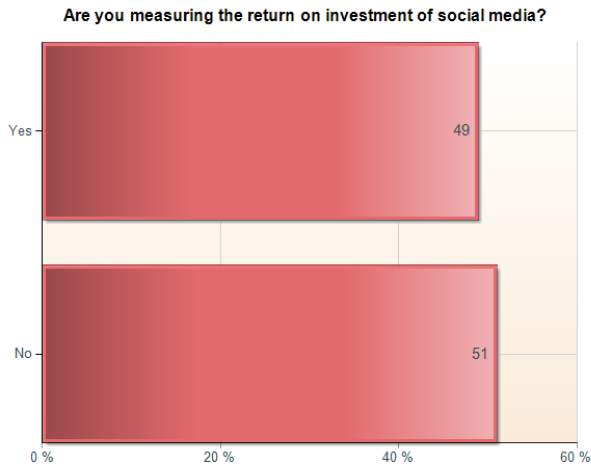
**Marketers**



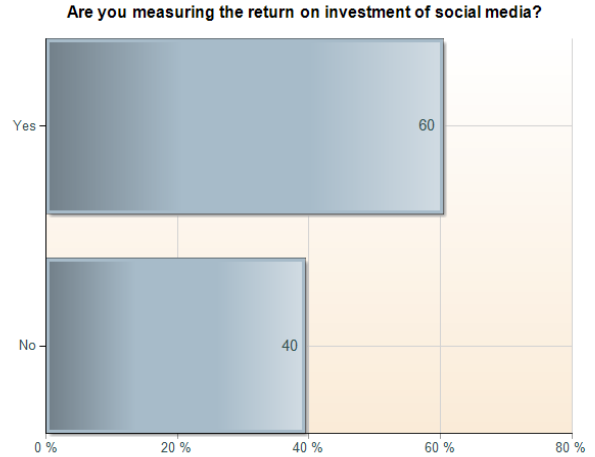
**Implications:** Find or create a method for measuring social/digital media. Make it proprietary, or use a known and well accepted method for measuring effectiveness in this space. At the end of this survey are the responses Ad Agency and PR executives provided in an open-ended response asking how they measured the effectiveness of social/digital media. The responses haven't been proofed for grammar or content, so have fun!

- Of the two primary marketing services disciplines surveyed, it appears that PR Firms have the leg up in terms of their ability/experience in managing the measurement of social media. 60% of PR Firms state that they do measure social media as compared to only 49% of Ad Agencies and 45% of Marketers.

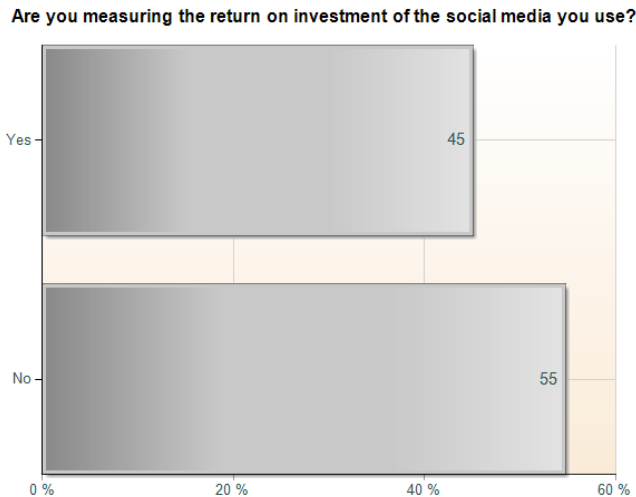
**Ad Agencies**



**PR Firms**



**Marketers**

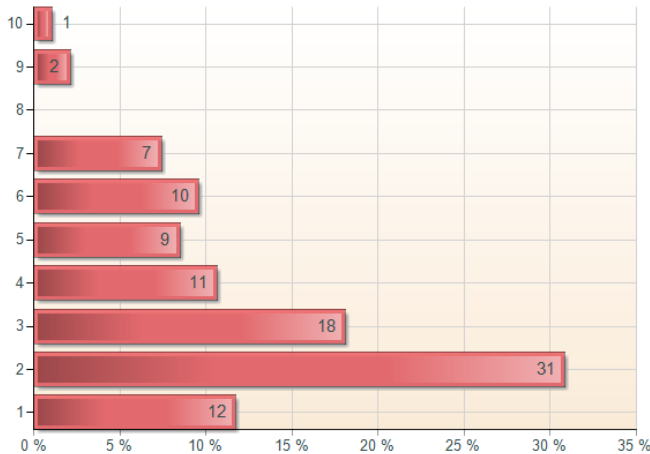


**Implications:** This fact potentially presents an opportunity for PR Firms to take hold of a greater share of mind in the ownership of the social/digital space overall – and at the same time presents a “watch-out” for Ad Agencies – that they better get on board with measurement if they want to stay relevant and helpful to their clients. We see some of these same differences (between Ad Agencies and PR Firms) play out later on in this report.

- 51% of PR Firms state that 40% or more of the work they do for their clients is in the social/digital space, as compared to only 39% of Ad Agencies, again a slight advantage for PR Firms.

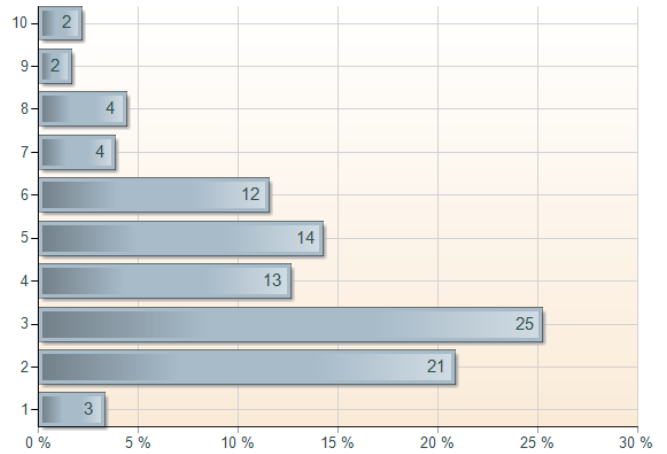
**Ad Agencies**

Approximately, what percent of the work you do for your clients is in the social/digital media space? (1=0% - 10=100%)



**PR Firms**

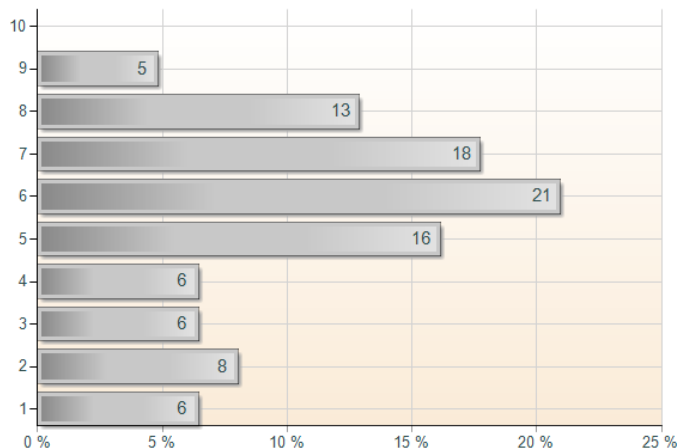
Approximately, what percent of the work you do for your clients is in the social/digital media space? (1=0% - 10=100%)



- While there isn't a wholesale shift by Marketers to the social/digital world, the chart below suggests that a shift is happening. 36% of Marketers state that they are "changing to social/digital a lot" (rating 7+ on a 10-point scale). We see it every day when we reach out to prospects for our agency clients...Agencies offering and Marketers asking.

**Marketers**

To what degree is your company changing budget allocations from more "traditional" media to social/digital media? (1=Not changing to social/digital - 10=Changing to social/digital a lot)

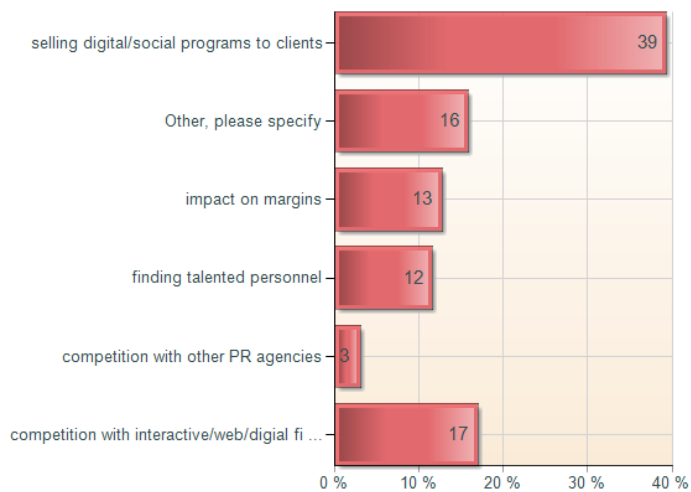


**Implications:** Not that marketing service firms need to play in social/digital for social/digital's sake, but it's important to know that it's where it's moving – not completely by any stretch – but it's moving. And again, if all else was equal, PR Firms seem better poised to capitalize on what appears to be a deeper and more robust participation in social/digital media – both in terms of their use of the media on behalf of their clients and their active measurement of the media's performance.

- I certainly understand that building a bigger social/digital media practice is easier said than done – and it plays out in the data in this study. But interestingly the biggest limiting factors aren't what you might expect (ie: limited margins in social/digital, difficulty in finding good, talented personnel). The biggest factor limiting Ad Agencies and PR Firms ability to grow these practices is primarily driven by clients' reluctance to buy.

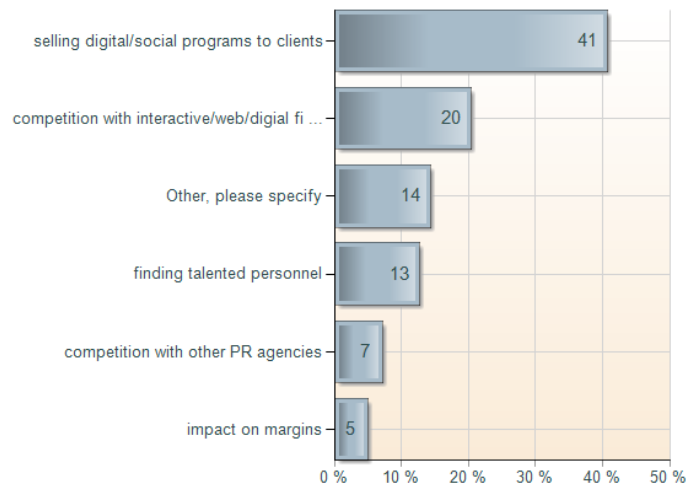
**Ad Agencies**

**What is the greatest challenge you face in building your agency's digital/social practice?**



**PR Firms**

**What is the greatest challenge you face in building your agency's digital/social practice?**

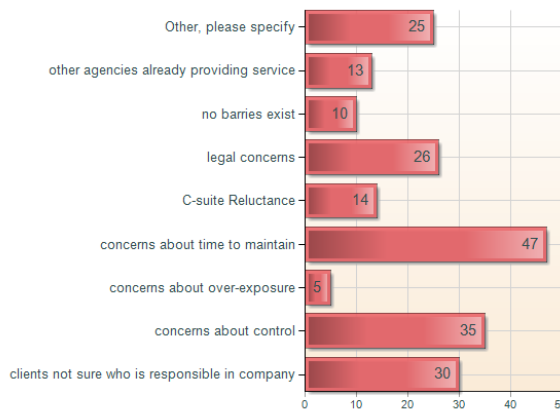


**Implications:** We suspect that the things holding prospective clients (or current clients) back from jumping head first into these mediums is that there is simply so much uncertainty – how to manage, time to manage, how to control, how to measure. As we'll see next, these issues surface as being the primary inhibitors to purchase – so addressing them head-on should help improve the likelihood of making the sale.

- Convincing prospects or clients that social/digital is the right place to play requires convincing them that they can control the medium (for those that think it's out of control), that you can help them manage the time it takes to effectively run a good program, and that as long as the right controls are placed on the programs, the threat of legal action if very limited. These all played out as the elements most likely to inhibit Marketers from wanting to play in this space.

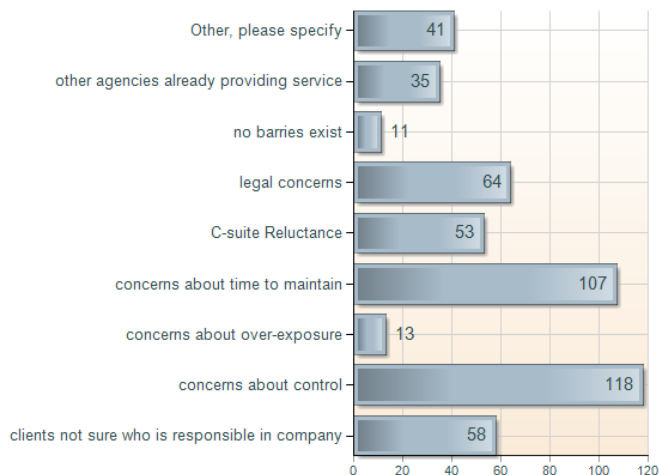
### Ad Agencies

What barriers exist when trying to sell your clients on the value of social/digital media? Check as many that apply.



### PR Firms

What barriers exist when trying to sell your clients on the value of social/digital media? Check as many that apply.

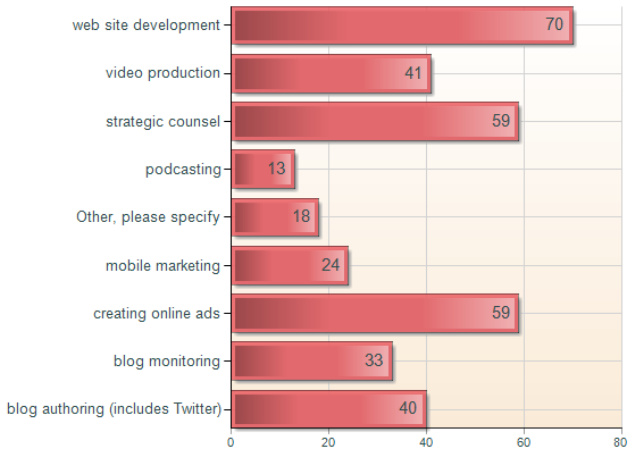


**Implications:** Show clients and prospects that you know what the typically issues are (as noted above). Acknowledge that you, yourself shared some of these same concerns going in (or that other clients of yours also shared these concerns). Showcase how to manage (and not to manage) this space effectively, and spell out in detail, your plans for how you're going to keep things current, in control, and pointed in a direction that effectively integrate with their broader marketing initiatives.

- Those that are selling social/digital media to their clients are selling all types of programs/offerings.

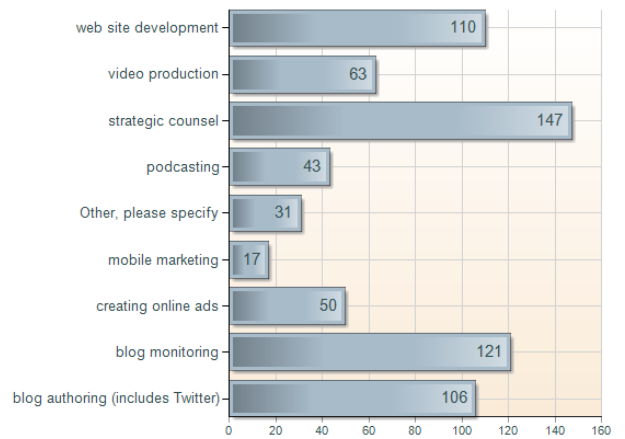
**Ad Agencies**

What digital capabilities are you selling to clients most often (Check as many that apply)?



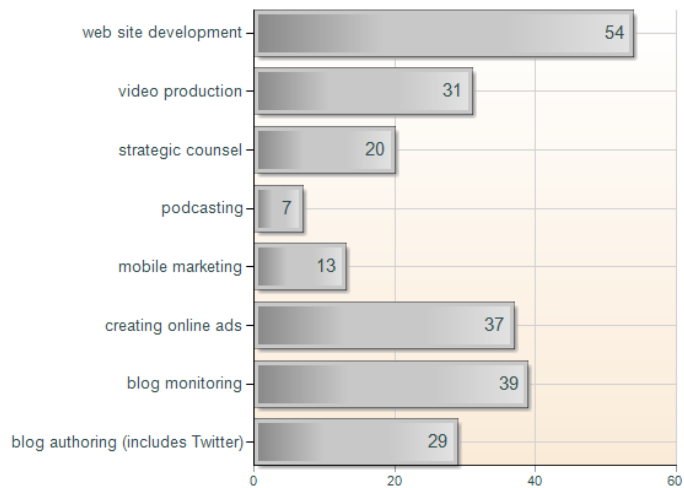
**PR Firms**

What digital capabilities are you selling to clients most often (Check as many that apply)?



**Marketers**

What digital capabilities are you using most often (Check as many that apply)?

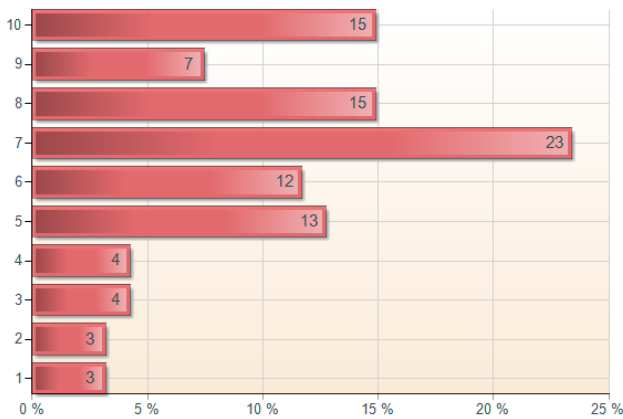


**Implications:** Simply doing web work and/or web work with content management programs isn't going to be enough longer-term. Marketers today are buying all types media in the social/digital media space. If you don't have the resources in-house, look for them outside so you can at least have different tools in the bag Marketers are buying - to offer as part of your strategic plan to help build an active presence in this space.

- One thing to be considerate of, if/when you do start playing in the social media space, is that you need to be transparent about how you present your client – meaning don't try and mask your client's presence in social spaces. Marketers don't seem too concerned, but as they get increasingly savvy in this space, I suspect their concerns about transparency will rise. 60% of Ad Agencies and 74% of PR Firms note that they believe social media has affected "a lot" the need for transparency, as compared to only 47% of Marketers feeling this way.

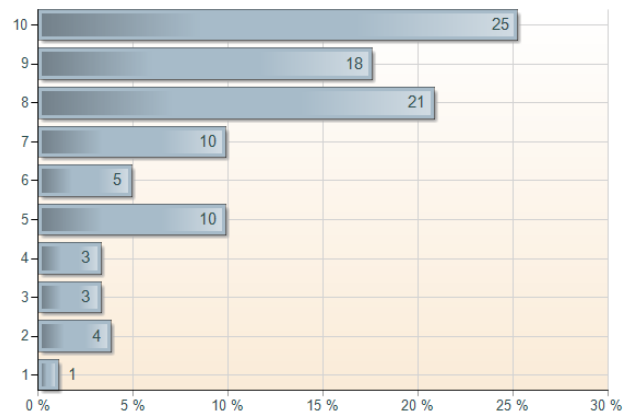
**Ad Agencies**

How much do you think social media has affected the need for corporations to be transparent/authentic? (1=Hasn't affected at all - 10=Has affected a lot)



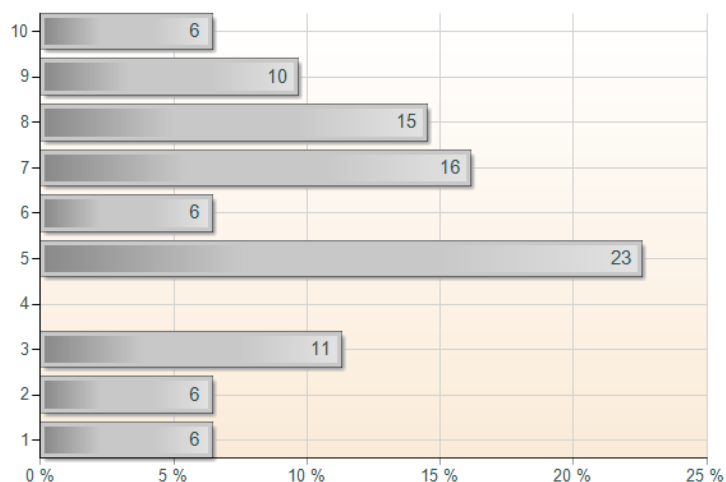
**PR Firms**

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**Marketers**

How much do you think social media has affected the need for your company to be transparent/authentic? (1=Hasn't affected at all - 10=Has affected a lot)

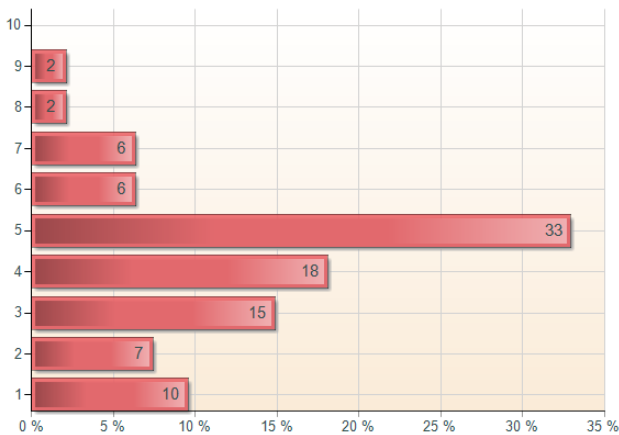


**Implications:** Take the lead on transparency when talking with clients and prospects. This will simply show Marketers you understand the issues, have the smarts to stay ahead of it, and give them the confidence that you know how to more effectively manage in these mediums.

- Same holds true of blogs. If/when you make the move into social media (either for yourself, or for your clients), recognize that bloggers are recognized mainly for what they are – one man or woman’s opinion. Overall, Ad Agencies, PR Firms, and Marketers don’t hold blogs up with comparable levels of credibility as traditional media. Only 11% of Ad Agencies, 9% of PR Firms, and 14% of Marketers believe that blogs hold higher levels of credibility.

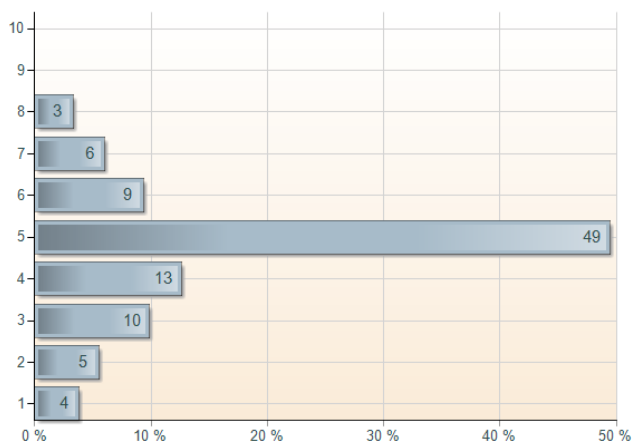
**Ad Agencies**

Do you treat blogs with less or more credibility than you treat "traditional" media? (1=A lot less credibility - 10=A lot more credibility)



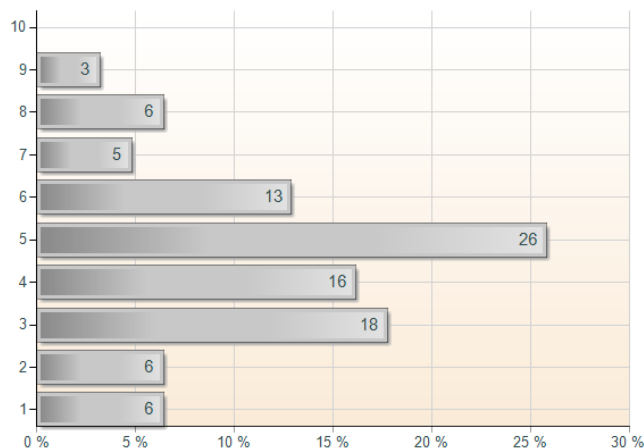
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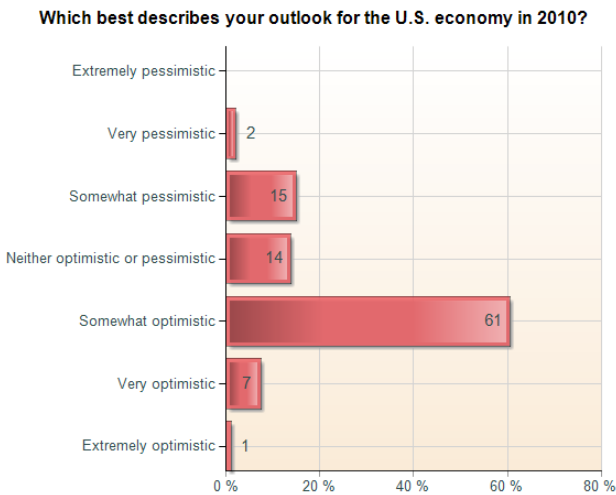


**Implications:** Many blog. Many have opinions. Marketers need to understand that just because they blog, doesn’t mean “they will come”. One way to build up credibility in blogging is to stick to a theme. If you’re the expert in healthcare, stay true to that position in all that you blog about. Comment on other blogs, carry other’s opinions into your blog – and comment on their position. The more exposure and the more focused you can be on your topic, the more likely you are to create higher order credibility in the blog space.

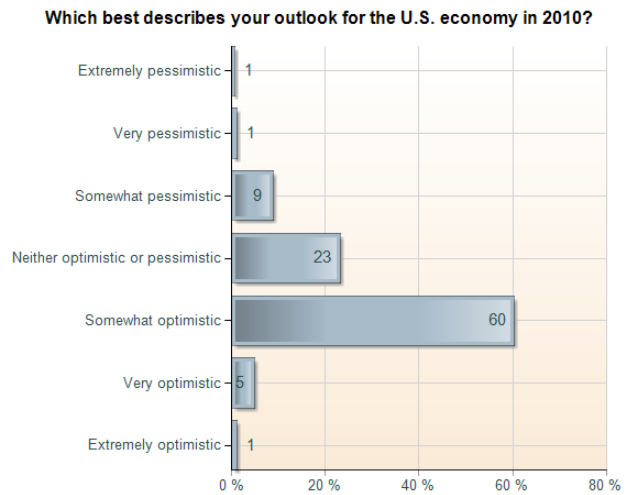
## Economic, Industry and Organizational Outlook

- Ad Agencies, PR Firms, and Marketers are generally in line relative to their feelings about the economy. Most are “somewhat” optimistic about the U.S. economy in 2010.

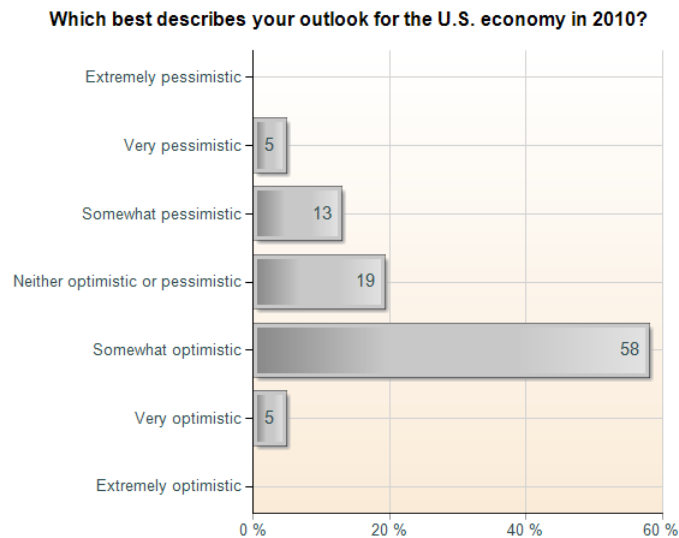
### Ad Agencies



### PR Firms



### Marketers

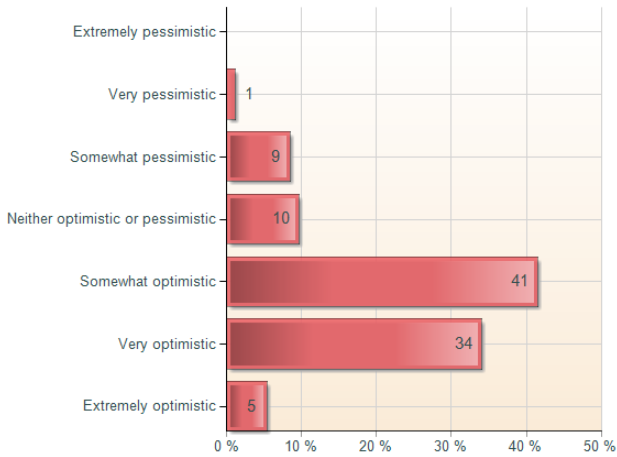


**Implications:** We’re seeing it in our efforts representing our marketing services clients. Meeting activity is on the up, conversion to new business is increasing. It seemed that once we passed the 1<sup>st</sup> Quarter of 2009, Marketers started to realize the sky wasn’t falling in, and it was ok to start spending again. While we may never see the same level of budgets again, there are signs we’re seeing that things are on the way back up.

- There is also general consensus relative to the health and potential of Ad, PR, and Marketing organizations among their respective executives.

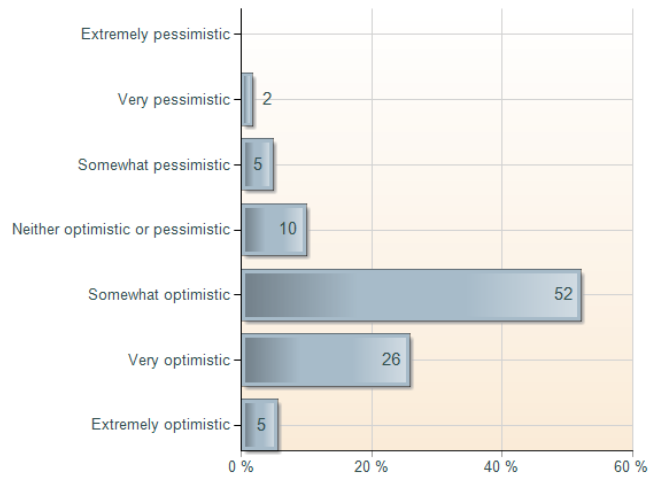
**Ad Agencies**

Which best describes your outlook for your organization in 2010?



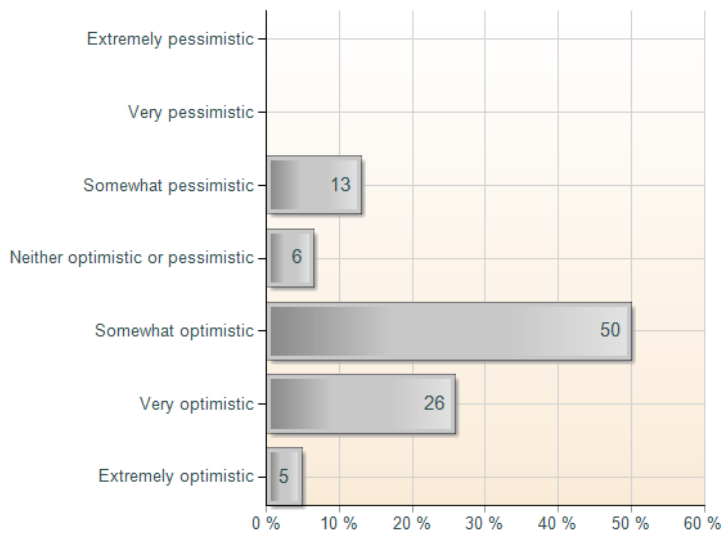
**PR Firms**

Which best describes your outlook for your organization in 2010?



**Marketers**

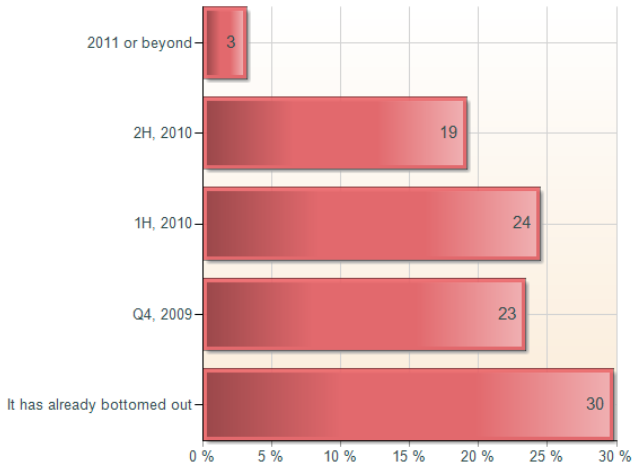
Which best describes your outlook for your organization in 2010?



- There are differences that exist between Marketers and their marketing service providers in this study – suggesting that Ad Agencies and PR Firms are bit more optimistic relative to the speed with which the economy will turn around.

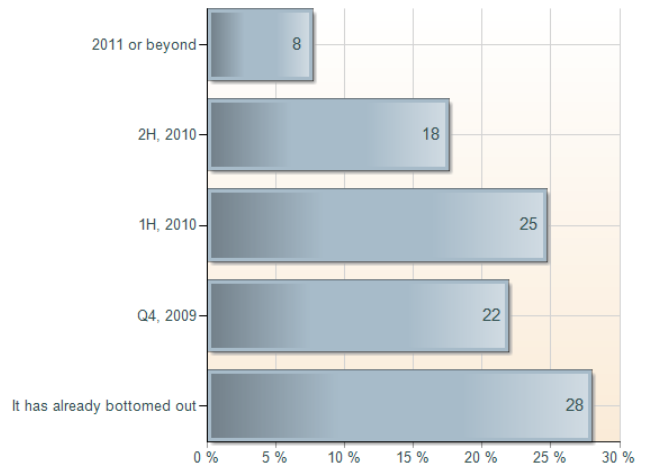
**Ad Agencies**

When do you think the recession will "bottom out" (in general)?



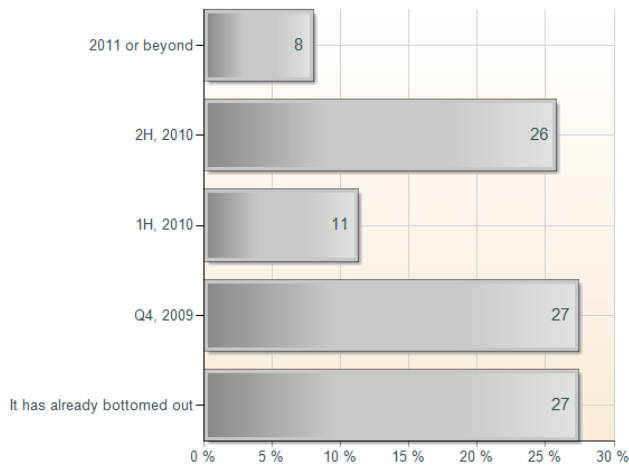
**PR Firms**

When do you think the recession will "bottom out" (in general)?



**Marketers**

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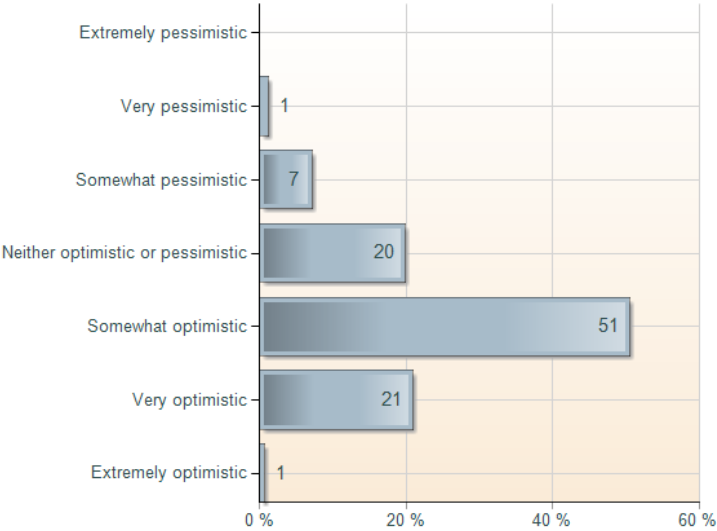


**Miscellaneous PR Insights/Findings**

- PR executives, on the whole, are a bit more optimistic about the future of their industry relative to how Marketers perceive the outlook for PR industry.

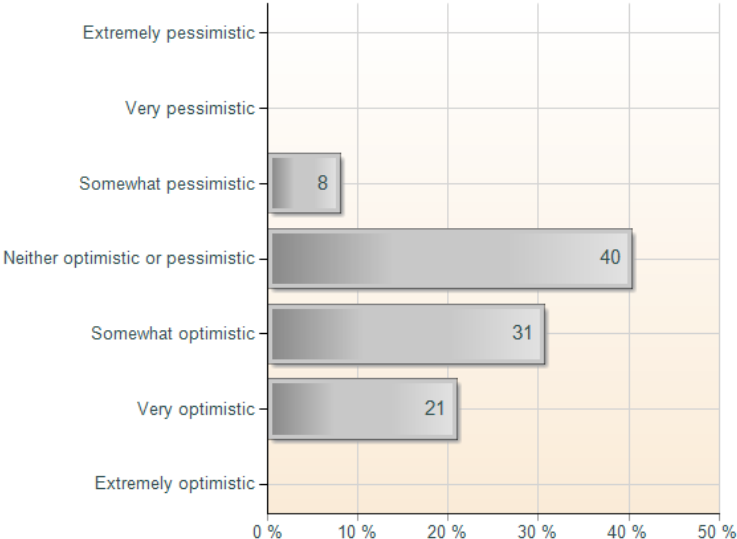
**PR Firms**

**Which best describes your outlook for the PR Industry in 2010?**



**Marketers**

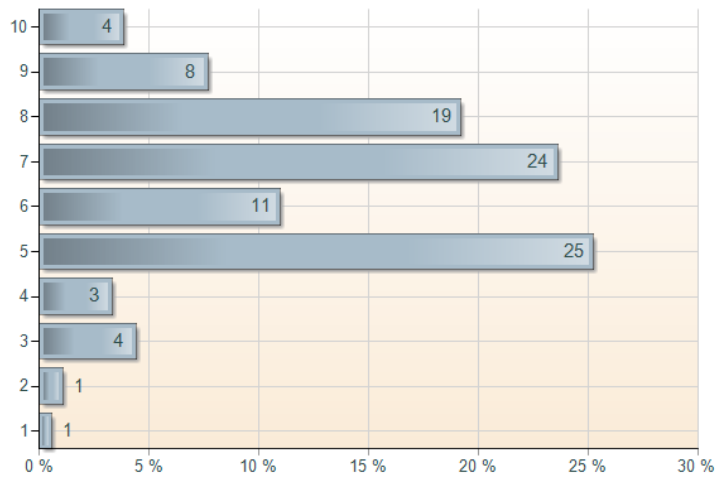
**Which best describes your outlook for the PR Industry in 2010?**



- This difference between PR Firms and Marketers could be driven in part, by the fact that Marketers do not feel that the move to Social/Digital Media is providing as positive an impact on the PR industry as PR executives themselves do. 55% of PR Firms feel that social/digital media is having a positive impact on the industry. This compares to only 39% of Marketers who feel this way. So while PR Firms appear to have somewhat of an edge on their involvement in social/digital (based on some of the earlier findings), it appears it will take some effort to convince Marketers otherwise.

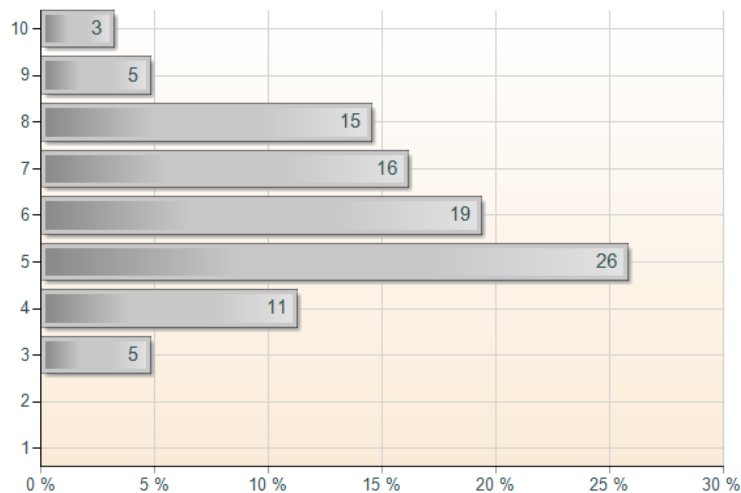
**PR Firms**

What kind of revenue impact do you feel that social/digital media is having on the Public Relations industry as a whole? (1=It is negatively impacting the industry - 10=It is positively impacting the industry)

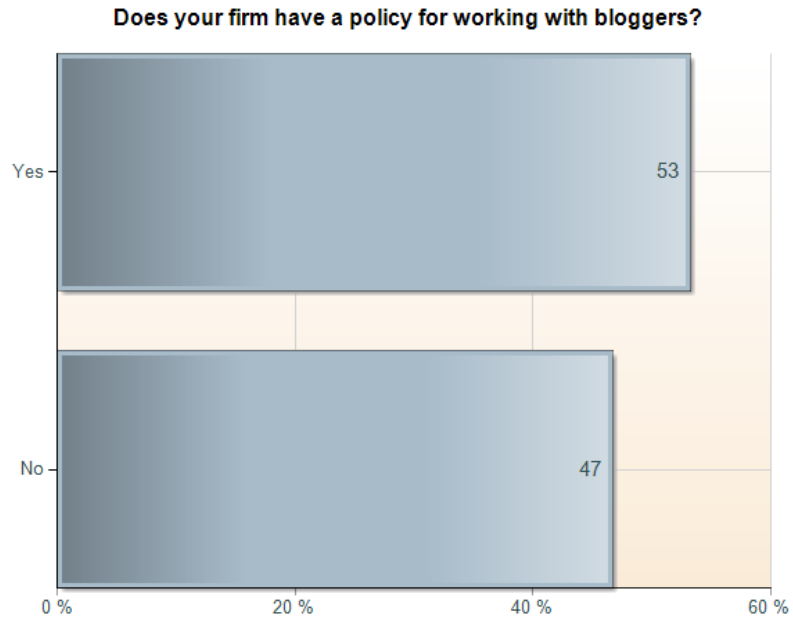


**Marketers**

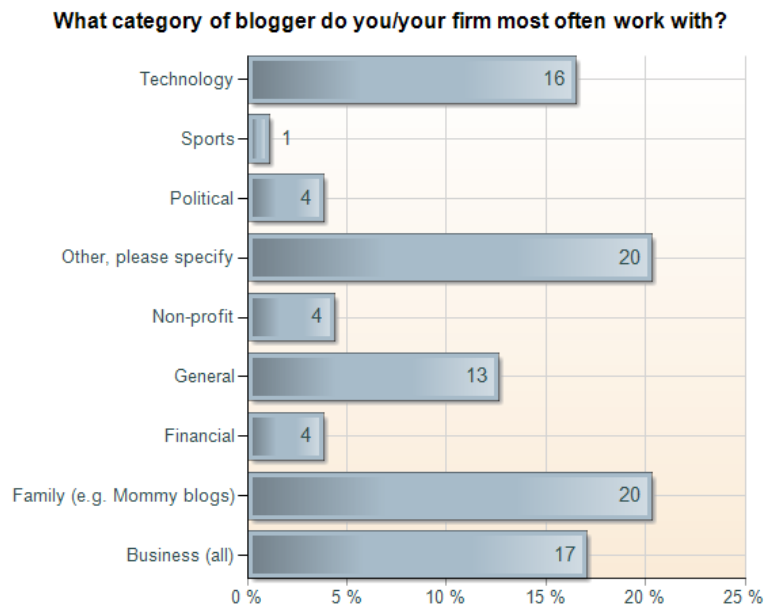
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- PR Firms are split on whether or not they have a policy for working with bloggers.



- Technology, Family, and Business are the three leading categories of blogs that PR Firms work most often with.





## **Ways in Which Ad Agencies Measure Social/Digital Media**

*(responses not proofed for grammar or spelling)*

Equivalence in paid online media exposure

Response versus amount of time and dollars spent. Follow-up with those commenting for new business elements, etc

on-line monitoring service

web traffic, affiliate marketing through blogs and companies like Market Leverage who generate sales for our Clients and we only pay on sales, click-thru rates, conversion rates, monitoring mentions and value of the mentions in the blogosphere

How we measure social media is dependent on the goal of the client. There are too many different metrics to list here. I would point you to the following website for a comprehensive list <http://rhappe.typepad.com/thesocialorganization/social-mediometrics>.

Online monitoring; comparing outreach to return; Google analytics; placements (re/blogs); conversations (Twitter); etc.

web monitoring

we have a proprietary methodology that is a mix of talent and technology.

We are tracking conversations that our clients are mentioned in as well as trackback to site traffic and actions taken

Through Advocates, we use Cost-Per-Advocate and project how much an advocate is worth to our brand

Web & CRM analytics

Using services that monitor share of voice in the digital space and then connecting that to share of customer/market.

Based on the consumption of assets and the overall return generated for the agency based on that expenditure—return includes all aspects of the client relationship, not just direct revenue

We utilize social media in order to grow our database which in turn raises our exposure

mostly on site at events; volume of use pre-event, during event, post event

web traffic, quality of twitter followers, banner clicks

Through research

We use a variety of listening tools combined with statistical analysis and data visualization.

in house methods

leads, conversions, ripple effects

pre-established metrics (# of unique visitors, length of time on site, # of emails captured, # of discussions/comments, etc.)

We have a program that searches the web for mentions and such and weights their relevance, tone, etc.

By returned comments and connections as well as measuring response to offers of information.



## **Ways in Which Ad Agencies Measure Social/Digital Media**

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Through our proprietary tools

visitors, comments

use, feedback

confidential information

We use several methods including web traffic and conversions (e.g. download of a store circular) ... as well as positive posts and placements ...

Tracking leads and sales that can directly attributed to social media expenses.

Traffic, visits to site, downloads, overlaid against a qualitative survey. Depends on the client, but it takes a variety of measures, not just one. Clients have to want to invest.

followers, fans, eyeballs, responses to promotions

Tracking on a regular basis via Google Analytics, Tracking blogs, Twitter, etc.

Mentions, impressions, analytics, social media monitoring via PR Newswire

Evaluating client information

ROI

the number of total reach periodically

Number of followers, number of registrations, if doing discounts - number of consumers who use discount code

Multiple tracking and feedback loops.

The metric is different for each channel. Everything related to our WOM teams' efforts is measurable.

Web site traffic, click-thrus, followers, etc.

various sources

Still in development phase.

Programs and measurements vary between clients based upon needs, events and strategy of the organization as a whole.

Web traffic, reposts, Technorati

# of impressions, Web site conversion (click-through ratios), impact on site traffic and "cold" inbound sales calls.

Engagements (i.e., number of followers, discussions, etc.)

Somewhat track outcomes, etc.

number of client mentions

monitoring sites and tracking distribution numbers; evaluating social media activities against business goals (sales, etc.)

We look at a variety of factors that are spelled out ahead of time. But our most used metric is bottom line impressions of the overall brand in social media efforts.



**Ways in Which PR Firms Measure Social/Digital Media**  
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varies by tactic, though as a whole, we measure by how we influence search across the topic areas in which our client exist.

Against established objectives for level of effort, coverage and exposure results, and demonstrable impact on campaign or corporate objectives

Qualitatively currently, seeking ROI model to measure quantitatively

Customized for each client, often incorporating their own approach to metrics / KPIs. But working to capture and measure against wide range of qualitative and quantitative measured.

Proprietary system called Business Outcomes

Depends on the specific tactic - fans, interactions, downloads, etc.

Multiple ways

It depends on the program -- but typically is a combination of several factors, e.g., number of followers/fans, number of visitors to a site, number of comments, consumer perceptions (via survey)

website hits, followers on twitter

Twitter followers, Facebook friends, blog reach, Diggs

By placement and direct results

Reports are based on the initial goals and objectives of the clients -- quantitative measurement such as click throughs, links, repostings (such as re-tweets), etc. and also qualitative measurement such as overall sentiment of comments, tweets, etc.

On a traditional scale of opportunity cost verses impact

Utilizing tracking software

Twitter grader

Tracking

e-consultancy

With tools provided by software used or online resources, such as Google Analytics, Vertical Response and manual Google searches.

Traffic data, Google Analytics, Coding

Webmaster monitors sites.

presence, message

Metrics such as Web site unique users - this is still an ongoing conversation

website visits, coverage by bloggers, upstream and downstream coverage via traditional media, sales.

Social media mentions, Web traffic, Web referrals, search volume, number of followers/friends, share of voice in relevant conversations, net promoter score.

Sales, community growth and engagement measures

not as well as we would like to. Been considering using services like pr newswire measuring tools.

We use variety of metrics to measure.



**Ways in Which PR Firms Measure Social/Digital Media**  
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We have extensive benchmarking and monitoring systems that evaluate visibility, influence, conversion metrics and other client-goal-specific measurements

Subscribing to Radian6 for a time, but decided not to continue with them

Frequency of posts and commenter engagement; amount of followers; Using Waggener Edstrom's Twenz program to monitor the tone of Twitter conversation.

Google analytics, 3rd party services

Yahoo Web Analytics; Google Analytics; Radian6

Monitoring total hits and quality of hits (news aggregator pickup vs. blog coverage, etc.)

Using audience figures

Social media monitoring via Blog and web searches, Stat counters, etc...

A combination of free and proprietary tools.

Sysomos

depends

We have a proprietary system that combines quantitative and qualitative analysis.

Share of voice, etc.

we have proprietary measures we have developed

A number of metrics: website click-thrus; bounce rates; blog postings/responses; video view rates, etc.

Viewing rates; references to clients; pass on rates

share of voice

tone

participation

mentions

driving traffic to websites

lead development

conversions

sales/revenue generation

We are trying... We use meltwater, twitter monitoring and a bunch of other tools to try to come up with social media values. Not even close to perfecting this yet, though we hear the same thing from most of our peers that we speak with

Impact on issue  
Favorable blogs

We measure both the outputs (visits, 'friends / followers,' length of time on a page / site), as well as outcomes (what actions / behavior do we see in audiences, in what ways opinions have changed)

Experimenting with a variety of tools

web traffic, followers, number of "fans"



**Ways in Which PR Firms Measure Social/Digital Media**  
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embedded metrics in client programs

Customized to client's program and based on established communications goals

We have created a proprietary formula.

in ways that match clients business objectives: from \$ to sign ups, to clicks and web site traffic and tonality of chatter.

Through tools like Radian6, blog searches, Meteor, etc.

client lead data, Google Analytics,

Against agreed upon objectives.

Depends on the platform. e.g., for Twitter it is the size of the following generated; for micro sites, it is often the traffic generated; across all brands it is the quality of consumer engagement generated.

software tools

various ways. too numerous to list.

Share of voice, tone and impressions.

the social media team has created criteria for success

We have a proprietary measurement system and also use Radian 6.

Radiant 6

Depends on the client

Establishing metrics in the beginning of a program

By comparing it with print news

variety of methods

proprietary

Online analytics

Widmeyer Metrix

Qualitative message/patterns of chatter analysis

web tracking

SERP results

Friends, Fans, Followers - quality, reach, depth, length of conversation, quality of followers

Sales

Hits, members....

No set way, it's tough.

Twitter followers, RSS feeds

We measure through Twitter, You Tube, etc.

Examining the "return on conversation" -- the degree to which clients are more deeply engaged with a brand online



**Ways in Which PR Firms Measure Social/Digital Media**  
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specific maintenance to different level journalists and executives. Strength media monitoring for client in social media; Propaganda publicity communication

multiple ways but primarily through revenue generation/improvement in customer service perceptions

Google Analytics and more

Through our proprietary program, Promised Results - we've developed it ourselves.

with clicks and link backs

crimson hexagon

digital mentions, sales leads generated

Tools such as Technorati, Google Analytics and Radian6

visitors to site, etc

Traffic generation, change in attitude or behaviour (depending on budget)

website traffic, number of reader comments, etc.

brand evaluation scale, web traffic, volume

Number of business leads/inquiries/opportunities

various proprietary methods

Varies by program -- no set measurement yet

Depends on client, but we have a proprietary tool we use to measure mindshare and content.

mostly outside dashboard services like radian6