Social Media and Investor Relations

How Social Media can add value to the Investors Relations of a large cap organization

Colophon

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Abstract

This thesis contains research to the use of Social Media for Investor Relations. This research was conducted in 2011 by Digital Communication student Kasper van Merrienboer and is commissioned by Interactive Investor. Interactive Investor is located in Sydney Australia. This is the reason that my thesis is written in English.

During my research I was looking for the question how Social Media can add value to the Investor Relations of a large cap organization and what does this offer to Interactive Investor? The research is divided in three parts:

- 1. Which Social Media channels add value for Investor Relations?
- 2. Are investors using Social Media?
- 3. Are public companies using Social Media for their Investor Relations?

All Social Media channels can be used for Investor Relations. It depends on how the companies are using Social Media, are they aware of the risks and do they know how to reach their target group? Investors believe that Social Media will play a increasingly important role in investment decisions in the future. If companies aren't using Social Media for their Investor Relations, they need to make it a priority and start right away.

Investors are slow on using Social Media for the decision-making on their investments but the amount of investors that use Social Media is growing per year. The results of the research give Interactive Investor an opportunity in creating a new Social Media platform. Currently there is one Social Media channel specific for the investment community named StockTwits (think of a Twitter for investors only). With Interactive Investors network in IR and their expertise on Social Media it is the perfect company to create a Social Media platform.

In the second part of this thesis there is a short summary on the Social Media platform Invedia that will be created by Interactive Investor in February 2012. For this platform a new branding was given to Interactive Investor. In the third part of this thesis I describe the rebranding of Interactive Investor. I was responsible for rebranding the corporate website and logo.

Acknowledgements

In this chapter I would like to take the opportunity to thank the people who made this research, rebranding and creation of the new Social Media platform possible.

First of all I would like to thank my parents who fully supported me from the moment I told them that I wanted to go to Australia for my graduation Internship. Susan Werkner for the opportunity she gave me to come and work for Interactive Investor. Shirley Tat and Ingrid Harso, on whom I always could count if I was struggling with my research, work or getting used to the life in Australia. This internship was the best experience I've had in my years as a student and therefore I would like to thank them all!

Kasper van Merrienboer Sydney Australia, January 2012

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Background Information

Graduation Internship

The education at the Academy for Digital Communication is rounded off with a graduation internship in the fourth year. During this internship, I had to complete a graduation assignment. This assignment was completed within an organization, and follows from the themes chosen during the student's course of study.

The organisation where I did my graduation internship is at Interactive Investor.

The Internship abroad

It was early in my study that I've decided to do my graduation internship abroad. It was at my previous study at the Grafisch Lyceum Rotterdam where my passion for studying abroad was born. In 2007 I had finished my gradation internship in Hyderabad, India and in 2009 I went to Valencia, Spain for my minor. For my graduation internship I chose Sydney in Australia to be the city where a new adventure would start.

I've contacted a Dutch organization named Stagehuis who could arrange a graduation internship according to my needs. Soon enough I had a Skype interview with a company called Interactive Investor who hired me as a graduation intern for 21 weeks starting at the end of June 2011.

Interactive Investor

Interactive Investor is an Online Investor Relations communications company settled in Sydney, Australia. On the following pages you'll find more information about Interactive Investor.

It's also important to understand the vision I have on Investor Relations and Social Media. That's what's written in this chapter Background Information.

Investor Relations

Before reading this thesis it is important to understand what Investor Relations is and how I personally define Investor Relations. When I've started at Interactive Investor I never heard of Investor Relations. Soon enough I began to understand the importance of Investor Relations and the possibilities it has public companies to offer.

Definition of Investor Relations

The NIRI Board of Directors defines Investor Relations as a strategic management responsibility that integrates finance, communication, marketing and securities law compliance to enable the most effective two-way communication between a company, the financial community, and other constituencies, which ultimately contributes to a company's securities achieving fair valuation. NIRI (National Investor Relations Institute) is the world largest professional Investor Relations association. The association, founded in 1969, is located in Vienna, Virginia, USA. With more than 3,500 members they represent over 2,000 publicly held companies and \$5,4 trillion in stock market capitalization.

I personally define Investor Relations as the communication between a company and the investment community. It's the responsibility of Investor Relations to communicate the (financial) business activities and strategy to the current and potential investors. Hereby the investors are able to make a fair judgment on their investments. The communication between a company and the investment community can be done in many ways, for this research I will focus on the digital communication only.

In most publicly held companies public relations specialists manage the Investor Relations. Investor Relations can be considered as one of the most important public relations specialization, at least based on the salary PR specialists earn. In 2006 Korn/Ferry International's Corporate Affairs Center of Expertise conducted a salary survey where they identify Investor Relations as the highest paid of the eight PR specializations. In attachment 1 you'll be able find the results of this survey.

^{1 (}NIRI)

² (The Korn/Ferry Institute)

The Investor Relations Officer

The PR specialists who manage the Investor Relations are the Investor Relations Officers (IROs). In April 2010, Korn/Ferry and NIRI conducted a study of the specialists who manage the investor relations. Unlike the study in 2006 where Korn/Ferry examined how the IROs are compensated, they have now also examined where the IRO's reside organizationally, the size and scope of their responsibility, and evolving trends in the function. For this study Korn/Ferry and NIRI spoke with 144 IROs within a Fortune 500 company.

According to the study the typical Fortune 500 IRO is a 40 to 49 year old male with a staff of two to four. Most IROs have worked in more than one industry during his or her career and have been in the top position as IRO between three and four years. Some 62 percent of the IROs had an MBA (Master of Business Administration).²

Most IROs (81%) report directly to the CFO but often also have access to the CEO. This is a significant shift from 2008 when 72% reported to the CEO and CFO. These numbers shows the critical value of the role of the IRO. CEOs and CFOs now expect the IROs to contribute to strategic debate.³ This means that IROs are not only responsible to understand and communicate the company's financial strategy to the investors; they also have to communicate the strategic direction of the company.

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² (The Korn/Ferry Institute)

³ (SpencerStuart)

Social Media

We human beings are social creatures and we have the need to interact with each other, share our thoughts, ideas and interests. We have had this need since the beginning of mankind and that hasn't changed since. What has changed is the time we live in. We live in a digital era where we now use social media to share our thoughts, ideas and interests. But what is Social Media? Lon Safko, writer of The Social Media Bible, has a simple answer to this question: "Social Media is the media we use to be social" (Safko, 2010).

What is Social Media

The Internet

It was British scientist Tim Berners-Lee who invented the Internet in 1987. The implementation in 1991 made Internet a global network. It allowed users to retrieve information from static web pages. Internet was, and still is, the fastest growing form of media. In 1996 there were approximately 45 million global users who were mainly located in North America and Western Europe (Kozinets, 2009). Back then the Internet was a one-way communication and existed out of one company or person pushing content out to others. This way of communicating on the Internet is what we now know as "Web 1.0" However Internet began to evolve and it was in 2004 when the term "Web 2.0" started to gain its popularity.

Web 2.0

According to Tim O'Reilly, founder and CEO of O'Reilly Media, the concept of "Web 2.0" began with a conference brainstorming session between O'Reilly and MediaLive International. One year and a half later the first O'Reilly Media Web 2.0 conference was held in October 2004. In the year and a half since, the term "Web 2.0" has taken hold, with more than 9.5 million citations in Google.⁴

Web 2.0 is a term that describes a new way in which software developers and end-users started to utilize the World Wide Web; that is, as a platform whereby content and applications are no longer created and published by individuals. Kaplan and Haenlein consider Web 2.0 as the platform for the evolution of Social Media.⁵

The term Web 2.0 is often associated with User-Generated Content.

(O Kelliy Media)

⁴ (O'Reilly Media)

User-Generated Content

The term User-Generated Content already explains itself, it's applied to describe content that is publicly available and created by end-users through web applications that are accessible and affordable for the general public. It's the criteria of Web 2.0 that allows users to create content and therefore can be seen as the technical foundation for User-Generated Content (UGC).

The term UGC achieved broad popularity in 2005. TIME Magazine's person of the year in 2006 was You (people who use Social Media and contribute to UGC): "For seizing the reins of the global media, for founding and framing the new digital democracy, for working for nothing and beating the pros at their own game".⁶

The Organization for Economic Cooperation and Development (OECD) listed 4 drivers of that made UGC possible:⁷

1. Technological

E.g. the widespread of broadband, new web technologies that facilitate the posting, rating and aggregation of data.

2. Social

E.g. the attitudes towards privacy, the rise of a generation of "digital natives."

3. Economic

E.g. the increased commercial involvement of Internet and media firms in the hosting of UGC and developing tools for the creation of UGC.

4. Legal

E.g. the rise of more flexible licensing schemes.

⁶ (TIME, 2006)

⁷ (Organisation for Economic Co-operation and Development, 2008)

Social Media

There are a lot of web applications that allow users to generate content. Applications that provide this service are called Social Media Channels in this thesis. In chapter 1 you'll find some of these applications. These applications may come in many forms for many different purposes e.g.:

- Blogs (e.g. Blogger)
- Social Networking (e.g. Facebook, Twitter, LinkedIn)
- Content Communities (e.g. YouTube)
- Collaborative Projects (e.g. Wikipedia)
- Virtual Worlds (e.g. Second life, World of Warcraft)

In Graph 1. you see the classification of social media by social media presence/media richness and self-presentation/self-disclosure from Kaplan and Haenlein.⁸

Graph 1. Classification of Social Media by social presence/media richness and self-presentation/self-disclosure

		Social presence/Media richness		
		Low	Medium	High
Self-presentation/	High	Blogs	Social Networking	Virtual social
Self-disclosure			Sites (e.g.,	worlds (Second
			Facebook)	Life)
	Low	Collaborative	Content	Virtual game
		projects (e.g.,	Communities	worlds (e.g., World
		Wikipedia)	(e.g.,YouTube)	of Warcraft)

⁸ (Andreas M. Kaplan, 2010)

Interactive Investor

Interactive Investor is an online Investor Relations communications specialist founded in 2005 by Susan Werkner. The company is located in Sydney, NSW, Australia. Interactive Investor offers different type of products to help manage the online Investor Relations for Australia's top large capitalization stocks.

Clients

Most of Interactive Investor's clients are ASX (Australian Securities Exchange) listed companies. Clients range from small to large caps that work in diverse industry sectors such as financials, healthcare and biotechnology, industrials and materials etc. Over the last 6/7 years Interactive Investor has delivered innovative online investor solutions for over 100 top listed companies such as:

- Stockland
- Commonwealth Bank of Australia
- Telstra Corporation Limited
- Westfield Limited
- Macquarie Group
- ING Real Estate Investment Management

and many more.

Target Group & end users

The IROs are Interactive Investor main target group.

The end users of the products are investors.

Products

Interactive Investor has four products that all serve the same purpose, help manage the online Investor Relations. Underneath you'll find the products listed as shown on the website: http://www.interactiveinvestor.com.au/.

IR Interact[™]

IR-Interact[™] is Interactive Investor's proprietary in-house software that creates interactive reports with the same look and feel as the print version. It comes with complete statistics and tracking solution and is fully customizable.

Interactive eFlashbook™

Interactive eFlashbook[™] provides a modern and clean aesthetic coupled with an animated view using Flash. If Flash is not installed, it will display a HTML alternative that also cuts through corporate firewalls. With the Interactive eFlashbook[™], investors can search, zoom, print, crop and email. Like IR-Interact[™], Interactive eFlashbook[™] can capture a multitude of comprehensive user statistics.

- IR-Connect™

IR-Connect™ combines IR-Interact™ with a custom-designed HTML landing page to create an interactive and user-friendly homepage for your interactive report. This allows investors, analysts and other stakeholders to immediately see an overview of your company's performance and highlights, allowing them to approach the report with a key message in mind. IR-Connect™ can segment reports into more manageable, user-friendly sections. This provides companies with the opportunity to customize key financial messages, showcase images and highlight sections and control the message.

- IR-Beyond

To better engage investors, online reports need to be user-friendly and interactive without compromising the key communication message. Interactive Investor's IR-Beyond™ is a full HTML website tailored to your report. IR-Beyond™ is modular, scalable and can be combined with our IR-Interact™ software. For example, you could have the front section of the report in HTML with the Financials in our IR-Interact™ software. As well as providing invaluable insights through user statistics, IR-Beyond™ provides customized branding and integration with your existing website to ensure your online report effectively communicates your company's corporate branding and values.

Definition of a problem

Susan Werkner is a member of AIRA (Australasian Investor Relations Association's) and a regular NIRI attendee. In June 2011, she attended the NIRI annual conference with Senior Digital Account Manager Shirley Tat in Orlando, FL USA. The NIRI Annual Conference is the annual event for the IR community of practitioners, counselors, and providers. While attending the conference, Susan and Shirley both noticed the lack of interest in the role of Social Media within IR compared to the other trends and technologies at the conference. Susan and Shirley are both social media enthusiasts and were surprised by the negative responses and lack of interest on social media.

Interactive Investor works closely with social media marketing company Tick Yess and therefore has a lot of experience in social media. They believe Social Media can be an added value within IR.

It was on my first day as a graduation intern at Interactive Investor when Susan and Shirley returned from the NIRI conference in the USA. This was the day I first heard about Investor Relations. As a Social Media enthusiast myself I of course already knew about Social Media. It was therefore they asked me to do research on the advantages and disadvantages on Social Media within IR and the opportunities it has to offer for Interactive Investor. I was given an x-amount of time for my research what eventually might lead to action.

Research Questions

Before starting this research I have set up a number of research questions that needed to be answered:

Main Question:

- How can Social Media add value to the Investor Relations of a large cap organization and what does this offer to Interactive Investor?

Sub Questions:

- What is Investor Relations?
- What is Social Media?
- Which Social Media channels are related for Investor Relations?
- Are public companies currently using Social Media for Investor Relations?
- Are current and potential investors using Social Media for Investor Relations?
- How can you reach the investors using Social Media?

Chapter 1. Social Media Channels

Part 1. The Research

Facebook

About Facebook

Founded in February 2004, Facebook is a social utility that helps people communicate more efficiently with their friends, family and coworkers. Anyone can sign up for Facebook and interact with the people they know in a trusted environment. Fundamental features to the experience on Facebook are a person's Home page and Profile. The Home page includes News Feed, a personalized feed of his or her friends updates. The Profile displays information about the individual he or she has chosen to share, including interests, education and work background and contact information. Facebook also includes core applications — Photos, Events, Videos, Groups, and Pages — that let people connect and share in rich and engaging ways. Additionally, people can communicate with one another through Chat, personal messages, Wall posts, Pokes, or Status Updates.⁹

Facebook for IR

The Facebook pages application is interesting for IR. The number of public companies with a pages page continues to grow. Most companies are using pages as a corporate page only and not as a specific IR page. According to Dominic Jones, IR Webreport's founder and an online IR consultant, pages could include enough relevant information to interest shareholders and prospective investors. ¹⁰

Pages are effective and engaging. It allows companies to share all kinds of media such as photos, events, videos and news information. Pages is an excellent way to communicate to the investors which allows a two-way communication between a company and the financial community. Since most companies only use a corporate page it might be worth thinking

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⁹ (Facebook, 2011)

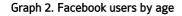
¹⁰ (Jones, 2009)

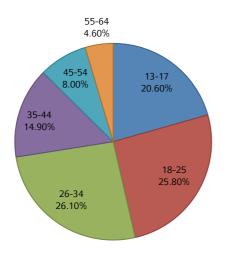
Facebook Statistics

A common phrase to explain the size of Facebook is: "If Facebook Were A Country, It Would Be The 3rd Most Populated". As of January 2012 Facebook has more than 800 million users and an enormous global reach. The official Facebook statistics says that they have more than 70 languages available on the site and 75% of all users are outside of the founding country the United States.

Facebook Demographics

According to Inside Facebook Gold's statistics from September 2011, 48.8% of the Facebook users are female and 51.2% are male. The top 3 countries with the most Facebook users are the United States (712.4 MM), Indonesia (40.1 MM) and India (34.6 MM). Australia is the 19th biggest populated country on Facebook with 10.5 million users. With a population of 22,328,800 (World Bank, World Development Indicators, 2011) that is almost 50% of all Australians with a Facebook account according to these statistics.





Most Facebook users are in the age from 26 to 34 (26.1%) followed by 18 to 25 (25.8%). The diagram on the left illustrates the global Facebook users by age from 13 to 64.

Google+

About Google+

Founded in February 2011, Google+ is the fastest growing Social Network ever. With your profile, you can manage the information that people see -- such as your bio, contact details, and links to other sites about you or created by you. Google+ Circles helps you organize everyone according to your real-life social connections--say, 'family,' 'work friends,' 'music buddies,' and 'alumni'. Then, you can share relevant content with the right people, and follow content posted by people you find interesting. Google+ Pages provides businesses, products, brands, and organizations with a public identity and presence on Google+. Google+ makes connecting on the web more like connecting in the real world. Share your thoughts, links and photos with the right circles. Use easy, spontaneous video chat to strike up conversations with as many as nine people at once. Get everyone on the same page with fast, simple group chat.¹¹

Google+ for IR

Google+ is a very young social network, however it is the fastest growing network so far. The functionalities, which Google+ has to offer companies, are good for IR but Google+ Pages is not much different from Facebook pages. Google+ is not mainstream since it has the same to offer as Facebook. Facebook is a larger and more known network. You could use both channels for IR; you're even able to connect Facebook with Google+. If a company has to choose it 's better to use Facebook because of its large network.

Google+ Statistics

With more than 62 million users in December 2011, Google+ is the fastest growing network ever.

Google+ Demographics

According to official Google+ statistics from January 2012, 30.4% of the Facebook users are female and 69.6% are male. The top 3 countries with the most Google+ users are the United States (2.3 MM), India (0.8 MM) and the UK (0.3 MM).¹²

¹¹ (Google, 2011)

¹² (FindPeopleOnPlus, 2011)

LinkedIn

About LinkedIn

LinkedIn started out in the living room of co-founder Reid Hoffman in 2002. LinkedIn is now the world's largest professional network and growing rapidly. LinkedIn connects you to your trusted contacts and helps you exchange knowledge, ideas, and opportunities with a broader network of professionals. The Profile represents your career accomplishments, enables people to connect and reconnect with you. Jobs lets you search for open jobs by location, company and post your job to receive applications from high-quality applicants. Groups allows you to discover the most popular discussions in your professional groups and lets you have an active part in determining the top discussions by liking and commenting. Company Pages are a company's profile of record on LinkedIn and a powerful way to speak to millions of professionals through word-of-mouth recommendations and trusted testimonials. It's like a LinkedIn profile for a company. ¹³

LinkedIn for IR

LinkedIn is a place for people to built professional relationships and is not a place where corporations engage with investors. Therefore LinkedIn isn't the best Social Media channel to use for IR. On the other end, LinkedIn could be useful for meeting with IROs. An IRO with extensive contacts could send out credibility to investors, which might play in the decision making of investing in a company.

Company Pages doesn't add a lot of value for IR. This is because the focus of Company pages is on the products, services and the overview.

¹³ (LinkedIn, 2011)

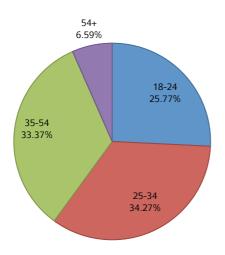
LinkedIn Statistics

As of November 3, 2011, LinkedIn operates the world's largest professional network on the Internet with more than 135 million members in over 200 countries and territories. More than 2 million companies have LinkedIn Company pages.¹⁴

LinkedIn Demographics

According to the LinkedIn Ad Platform statistics from January 2012, 42.1% of the LinkedIn users are female and 57.9% are male. The top 3 countries with the most LinkedIn users are the United States (58.5 MM), India (13.3 MM) and the United Kingdom (8.4 MM). Australia is the 9th biggest populated country on LinkedIn with 2.8 million users. With a population of 22,328,800 (World Bank, World Development Indicators, 2011) that is more than 10% of all Australians with a LinkedIn account according to these statistics.

Graph 3. LinkedIn users by age



Most LinkedIn users are in the age from 25 to 34 (34.3%) followed by 35 to 54 (25.8%). The diagram on the left illustrates the global LinkedIn users by age from 18 to 54+.

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¹⁴ (LinkedIn, 2011)

SlideShare

About SlideShare

SlideShare is a community for sharing presentations. SlideShare features a vibrant professional and educational community that regularly comments, favorites and downloads content. SlideShare content spreads virally through blogs and social networks such as LinkedIn, Facebook and Twitter. Individuals & organizations upload documents to SlideShare to share ideas, conduct research, connect with others, and generate leads for their businesses. Anyone can view presentations & documents on topics that interest them, download them and reuse or remix for their own work.

SlideShare for IR

Dominic Jones on SlideShare: "all IR departments should already be using the free service because there's no downside to doing so". 15

The main reason to use SlideShare for IR is for exposure to SlideShare's 60 million monthly visitors. By using SlideShare you enable these users to spread your company's information across the web through embedding in a format that's quicker than viewing an online PDF. SlideShare is not for connecting with your investors in a two-way communicative way but when using SlideShare there is a big chance of reaching a new group of investors or informing your current investors.

¹⁵ (Jones D., 2010)

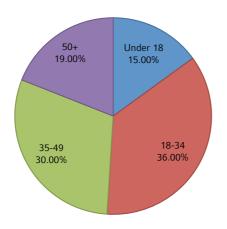
SlideShare Statistics

SlideShare is, with 60 million monthly visitors and 130 million page views, the world's largest community for sharing presentations.

SlideShare Demographics

According to the Amzini SlideShare statistics from January 2012, both 50% of the SlideShare users are male and female. ¹⁶ The top 3 countries with the most SlideShare users are the United States (14%), India (11%) and the Brazil (6%). ¹⁷

Graph 4. Slideshare users by age



Most SlideShare users are in the age from 18 to 34 (36.0%) followed by 35 to 49 (30.0%). The diagram on the left illustrates the global SlideShare users by age from 18 to 50+.

¹⁶ (Amzini, 2011)

¹⁷ (Sharenator, 2011)

StockTwits

About StockTwits

On StockTwits, you will find a community of traders and investors sharing market insight, ideas, charts and news streaming in real-time. On the stream, you will find focused and curated ideas about Stocks, Futures, Forex, and the market and economy in general. Ideas shared on the StockTwits stream come in 140 character messages (like Twitter). These short messages can also include data like charts and links. The best way to describe StockTwits is to compare it with Twitter but for a community of traders and investors.

StockTwits for IR

Ezra Marbach, investor and advisor in the finance 2.0 at IR Web report, on StockTwits: "ST is also a surprisingly useful platform for investor relations officers (IROs) and public companies looking to engage investors."

StockTwits is a channel made for the investment community. Therefore you can't ignore this channel as a public company. The amount of visitors is not as high as the other Social Media channels from this research, but the all the visitors of StockTwits are the IR target group.

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¹⁸ (StockTwits, 2011)

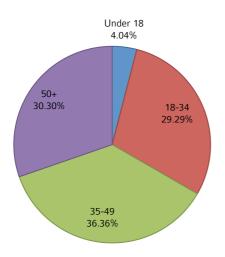
StockTwits Statistics

With more than 100.000 registered users, StockTwits is the one of the biggest Social Media channel specific for traders and investors. StockTwits was founded 2008 by Howard Lindzon. StockTwits was recently named "one of the top 10 most innovative companies in web" by FastCompany and one of the "50 best websites" by Time magazine. ¹⁹

StockTwits Demographics

According to the Quantcast StockTwits statistics from January 2012, both 25% of the StockTwits users are female and 75% are male users. There are no known geographic statistics on StockTwits.

Graph 5. StockTwits users by age



Most StockTwits users are in the age from 35 to 49 (36.36%) followed by the 50+ (30.30%). This makes StockTwits the Social Media channel with the eldest user age average. The diagram on the left illustrates the global StockTwits users by age from under 18 to 50+.

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¹⁹ (StockTwits, 2011)

Twitter

About Twitter

Founded in February 2006, Twitter is a real-time information network that connects you to the latest information about what you find interesting. Simply find the public streams you find most compelling and follow the conversations. At the heart of Twitter are small bursts of information called Tweets. Each Tweet is 140 characters in length. Twitter connects businesses to customers in real-time. Businesses use Twitter to quickly share information with people interested in their products and services, gather real-time market intelligence and feedback, and build relationships with customers, partners and influential people. ²⁰

Twitter for IR

Twitter is an excellent channel for real-time conversations between company and investor. With it's millions of users the news spreads faster than light on Twitter. This could be an advantage but also a disadvantage. With sensitive information such as stock-, company- or any other IR related information it's important to have a well thought out strategy when using Twitter.

Twitter is also a good channel for the investors to express their feelings, positive or negative, on a company. Therefore it's important to join Twitter as a public company an be part of the conversation with the investors and even competitors. Keep track of what the investors are tweeting about your company and join the conversation.

²⁰ (Twitter, 2011)

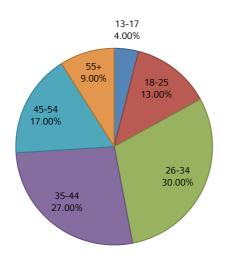
Twitter Statistics

In 2010 Twitter had more than 100.000 followers. Twitter has experienced a large amount of growth in users.²¹ According to the official Twitter blog, Twitter is offered in 21 languages as of January 2012.

Twitter Demographics

52% of the Twitter users are female and 48% are male. According to the Sysomos statistics from October 2009 the top 3 countries with the most Twitter users are the United States (50.88%), Brazil (8.79%) and the United Kingdom (7.20%). Australia is the 7th biggest populated country on Twitter.²²

Graph 6. Twitter users by age



Most Twitter users are in the age from 26 to 34 (30%) followed by the 35 to 44 (27%). The diagram on the left illustrates the global Twitter users by age from under 13 to 55+.

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²¹ (Digital Surgeons, 2010)

²² (Sysomos, 2010)

YouTube

About YouTube

Founded in February 2005, YouTube is the world's most popular online video community, allowing millions of people to discover, watch and share originally-created videos. YouTube provides a forum for people to connect, inform, and inspire others across the globe and acts as a distribution platform for original content creators and advertisers large and small. YouTube allows people to easily upload and share video clips on www.YouTube.com and across the Internet through websites, mobile devices, blogs, and e-mail.

Everyone can participate in the YouTube community by watching, sharing, and commenting on videos.²³

YouTube for IR

Most IR websites have video messages from CFOs or CEOs. Some public companies (Shell for example, http://www.youtube.com/user/Shell) are using YouTube to embed these videos on their own website. The advantage of using YouTube is that investors are able to find you on YouTube and share your message.

My advice is, if you are using video on your corporate website, use YouTube instead of your own video player. You want your message to be heard, with YouTube your able to spread the message faster.

²³ (YouTube, 2010)

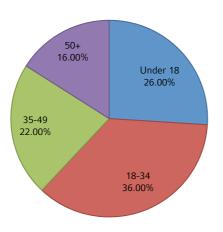
YouTube Statistics

About YouTub As of January 2012 YouTube has more than 800 million unique visitors. The official YouTube official statistics say that they are localized in 25 countries and 43 languages and 70% of all YouTube traffic comes from outside of the founding country, the United States. Nearly 17 million people have connected their YouTube account to at least one social service (Facebook, Twitter, etc).²⁴

YouTube Demographics

Both 50% of the YouTube users are male and female. ²⁵

Graph 7. Facebook users by age



Most YouTube users are in the age from 18 to 34 (36%) followed by users under 18 (26%). The diagram on the left illustrates the global Twitter users by age from under 18 to 50+. ²⁶

²⁴ (YouTube)

²⁵⁺²² (Quantcast, 2012)

Result and Findings

Overall Statistics

Channel:	Launched in	Registered users	Male	Female	Avg. age
Facebook	2004	800.000.000+	48.8%	51.2%	26-34 (26.10%)
Google+	2011	62.000.000+	69.6%	30.4%	unknown
LinkedIn	2002	135.000.000+	57.9%	42.1%	25-34 (34.27%)
SlideShare	2006	*55.000.000+	50.0%	50.0%	18-34 (36.00%)
StockTwits	2008	100.000+	76.0%	24.0%	35-49 (36.36%)
Twitter	2006	100.000.000+	48.0%	52.0%	26-34 (30.00%)
YouTube	2005	*800.000.000+	50%	50%	18-34 (36.00%)

* Unique visitors per month

Even though the use of Social Media for male and female is almost evenly divided, there are more male users on the Social Media channels than female users. The average user is in the age between 25 and 34. Most users are active in the U.S.

Know the risks, join the conversation

By using Social Media channels you'll have an enormous global reach with millions of users. Public companies should use Social Media to communicate with these users in order to find new investors, or their current investors. However, if a public company chooses not to communicate with Social Media for their IR, they have to be aware that millions of others are using Social Media. Therefore it's important for IROs to monitor what the people are saying about the company on the Internet.

If a company is registered on the Social Media channels it's easier to track what people are saying about the company. Companies have to understand that Social Media is a very public medium and what is published on Social Media channels is often permanent. Companies have to be aware of the weaknesses and threats of each Social Media channel.

Social Media for IR

Some Social Media channels are better than the other. The advices given on the previous pages were based on my own opinion and the opinion of online IR advisors. Based on these opinions a SWOT-analysis has been made. Based on the SWOT-analysis the Social Media channels were prioritized with the MoSCoW method:

	Channel:	Strength	Weaknesses	Opportunities	Threats
	SlideShare	- Exposure	- Paid user accounts	- Attract new	- Substitutes, such
Must		- Fast Technology	Advertising in sheetsFlash not always supported	investors	as PowerPoint
	StockTwits	- Investors Only - Free	- Small user amount - Relatively unknown	- Attract new investors	- Twitter

Should

Channel:	Strength	Weaknesses	Opportunities	Threats
Facebook	- Market Leader - Largest Network	- No profile customizing	AdvertisingCollect user data	- Privacy settings
	- Free	- Not IR related		
Twitter	- Large Network - Real time - Free	SpamSite is down oftenNot IR related	- Search engine	- Unauthorized accounts, imitators

plno

Channel:	Strength	Weaknesses	Opportunities	Threats
Google+	- User growth	- Behind Facebook	- Advertising	- Facebook
	- Owner Google	and Twitter	- Other Google	- Privacy settings
	- Analytics	- Not mainstream	features	
	- Free	- Not IR related		
LinkedIn	- Professional users	- To much Job	- Connect IROs with	- Recruitment sites
	- Corporate	related	investors	
	environment	- Limited access		
YouTube	- Unlimited uploads	- Flash not always	- Video to go viral	- Copyright
	- Large network	supported		Infringement
	- Free			
	- Embed in own site			

Chapter 2 | Use of Social Media

Part 1. The Research

Use of Social Media by Investors

The 'investor' is eventually the end-user of the Social Media used by public companies. The investors are their target group and therefore it is important to know wetter the investors are using Social Media or not. If there are no investors who use Social Media it's a waste for public companies to use Social Media for IR. I did a desk research to find out who the investor is, if they are using Social Media and how they look at Social Media for in the future. I used two main researches for this desk research, which are:

- "Australian investors: at a glance" from ASIC (Australian Securities & Investment Commission)
- "Institutional Investors New Media Use Brunswick Group Survey" from Brunswick Group

Who is the investor?

In order to start the research on the use of social media by investors it is important to define what investors are and how they define themselves. I used data from the findings of a research conducted for ASIC (Australian Securities & Investment Commission) by R. Morgan about Australian investors. In late 2006 the research was conducted with focus groups and interviews among 50 Australian investors. This research was followed in 2007 by a phone survey with more than 1,200 investors. "ASIC aimed to obtain an accurate and in-depth understanding of the Australian investor population, including who they are, how they make decisions and evaluate investment opportunities, and the ways in which they are potentially at risk of making poor investment decisions." (Australian Securities and Investments Commission, 2008). The research was published in April 2008.

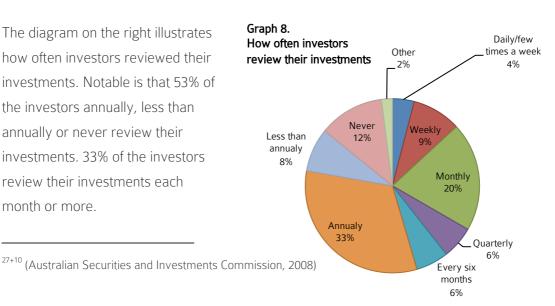
Definition of an investor

R. Morgan defined investors as: "people with income available to contribute to an investment, outside of their own home or business and also outside of the compulsory 9% superannuation contribution."²⁷

Demographic profile of the Australian investor²⁸

- 69% Employed and 19% retired
- 48% Home owners and 36% Paying off home
- 68% Married
- 47% aged 50+
- 42% has diplomas/degrees

The diagram on the right illustrates how often investors reviewed their investments. Notable is that 53% of the investors annually, less than annually or never review their investments. 33% of the investors review their investments each month or more.



³⁴

Are the investors using Social Media?

Information sources of the investors

In the research from R. Morgan Overall, 44% investors did or would use media (i.e. *the Internet*, financial magazines, daily newspapers, TV investment programs or radio investment programs) for both investment information and to seek investment opportunities and advertisements. A further 38% used/would use the media for investment information only. Only 7% said they used/would use these media exclusively to seek investment opportunities and advertisements.²⁹

According to research from the Brunswick Group in 2009: 47% of the investors read blogs, 39% read message boards and 10% use Social Network sites. 30 Based on the information the investors read on the Internet less than half made a decision on their investment.

Graph 9. Institutional Investors New Media
Use

Read Information

Made decision

47%

39%

20%

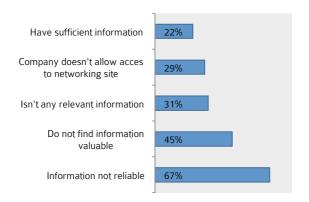
14%

10%

4%

Blogs Message Boards Social Network Sites

Graph 10. Why haven't you used information from a social networking site in the past?



Thoughts on Social Media

67% of the investors believe that the information on social networks isn't reliable. ¹³ Most investors had been exposed to frauds and/or scams. ³¹ This might cause the suspicion of social media and social networks which result in the more or less negative percentages illustrated here on the left.

²⁹⁺¹⁴ (Australian Securities and Investments Commission, 2008)

^{30+13 (}Brunswick Group, 2009)

Scams in Social Media

Here is a quote from an investor in R. Morgan focus group when being asked about his experiences with fraud or scams:

"Oh absolutely, I get 10,000 scams a day to buy shares in the US or something." (Male, investment property focus group, Syd)

Dealing with Social Media fraud and/or scams

The top three recommendations to avoid fraud and/or scams from this focus group were:³²

- 18% deal with reputable or well known companies/people
- 18% do lots of research
- 17% check out what you are investing in

These recommendations were given for fraud and scams, which are offline. Like I said before, Internet is the fastest growing form of media. The popularity of Social Media channels keeps on growing and so do the risks of using them. Investors that use Social Media for IR are easy targets for hackers, spammers, virus writers, identity thieves, and other criminals. Because investors are dealing with such sensitive information, it might scare them of using digital communications such as Social Media. Microsoft has put up a list with 11 tips for Social networking safety on their website:

- 1. Use caution when you click links
- 2. Know what you've posted about yourself
- 3. Don't trust that a message is really from who it says it's from
- 4. To avoid giving away email addresses of your friends, do not allow social networking services to scan your email address book.
- 5. Type the address of your social networking site directly into your browser or use your personal bookmarks.
- 6. Be selective about who you accept as a friend on a social network.
- 7. Choose your social network carefully.
- 8. Assume that everything you put on a social networking site is permanent
- 9. Be careful about installing extras on your site.
- 10. Think twice before you use social networking sites at work
- 11. Talk to your kids about social networking³³

³² (Australian Securities and Investments Commission, 2008)

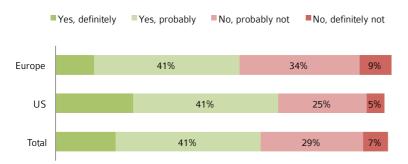
^{33 (}Microsoft®)

Will investors use Social Media?

Future opportunities

In the research of the Brunswick Group they have asked the investors whether social media will play an increasingly important role in investment decisions in the future. In the graph illustrated here on the left-bottom you'll find the results.

Graph 11. Will Social Media play a increasingly important role in investment decisions in the future?



The results of the research contains the predictions of European and US investors only, but in both cases more than half of the respondents answered with: "Yes". This means more than half of the investors are positive on using Social Media.

Result and Findings

Even though more than half of the investors are positive on using Social Media in the future, there are still a small percentage of investors using social media today. A conclusion that can be drawn from this research is that the use of Social Media for investors has to do with age. The average age of Social Media users are for most platforms the young adults (18-34). In the demographic profile of the typical Australian investor we saw that almost half of the investors are aged 50 or above. As we are able to see in the social media channels statistics this age group is a small percentage of Social Media users. The only Social Media channel with the eldest users is StockTwits, a channel specifically for investors. If this theory is correct it means that most of the investors of the future are already using Social Media today. Personally I think Social Media will play an increasingly important role in the future and it could already play an important role today. The only problem is that Social Media depends on a network, in order for a Social Media channel to grow it needs users who create (UGC) and share content.

The other problem with the use of Social Media by investors is a problem that is not time related (unlike the theory from above). This is the problem that Investors are exposed to frauds and/or scams everyday. This makes them suspicious on using Social Media where you also have to deal with hackers, spammers, virus writers, identity thieves, and other online criminals. I think when investors learn how to protect themselves from these online criminals Social Media will become more valuable and more reliable. Start using Social Media is the same as making an investment, before your start:

- Deal with reputable or well known companies/people
- Do lots of research
- Check out what you are investing in

Chapter 3 | Use of Social Media

Part 1. The Research

Use of Social Media by Public Companies

People use Social Media for an effective two-way communication. If you look at the NIRI definition of Investor Relations ("Enable the most effective two-way communication between a company, the financial community, and other constituencies") you might expect Social Media is ideal for Investor Relations.

Dominic Jones of IRwebreport.com said in 2009: "We have reached the tipping point for Social Media in investor relations. If you're not using Social Media in your IR program yet, you need to make it a priority and start right away."³⁴

Jones said this in 2009 and since then the use of Social Media increased rapidly. For the research of the use of Social Media by public companies I did a desk research. The Q4 Whitepapers on Social Media by public companies gave me lot of insights.

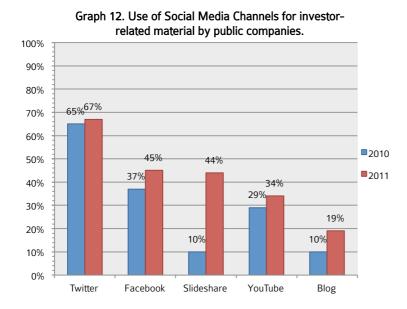
³⁴ (Jones D., 2009)

Are public companies using Social Media?

Use of Social Media Channels

The whitepaper written by Sheryl Joyce from Q4 Web systems shows that public companies are using Social Media for investor-related material. For this research Q4 Web Systems has scanned and reviewed 629 public companies from all over the world.

Graph 12, below, shows the results of the use of popular IR social media channels.



Notable is that all social media channels have experienced a growth in use over the last year.

Twitter is the most used Social Media channel followed by Facebook.

SlideShare has experienced a tremendous amount of growth in use and now is almost equal to the use of Facebook.

The U.S. uses Social Media the most for IR. Canada comes in second with Germany and the UK not far behind. ³⁵ Australia belongs in the top 10 countries of using Social Media for IR.

In attachment 2 and 3 you'll find the use of Facebook and Twitter per industry.

-

³⁵ (Joyce, 2011)

Why companies are not using Social Media?

Negative user responses

Some companies are afraid to use Social Media because it is a very open platform. There is a chance that negative comments will be placed on a company's channel. A study conducted in 2010 by research firm Yankee Group and commissioned by Siemens

Enterprise Communications, showed that 57% of customers would improve their loyalty to a company that uses Social Media. Most of these customers felt that companies should be monitoring social media for customer feedback. 70% of consumers want to interact via Social Media. These results show that consumers rather have companies that talk with them instead of ignoring them on Social Media.

80%
70%
60%
50%
40%
30%
20%
10%
0%
Improve loyalty Want to interact Use Social Media daily company's Social Media

Graph 13. (Siemens) client behaviour to companies with Social Media

Return on Investment

There is no formula to calculate ROI in Social Media. With most Social Media channels you're able to see how many followers you have or how many likes but you're not able to see the gain from the investment.

-

³⁶ (Siemens Enterprise, 2010)

Result and Findings

Interesting to see is that use of Social Media for investor related material is growing tremendously per year. SlideShare experienced a growth of more than 400% in one year and companies are used blogs twice as much in 2011 as in 2010.

If you look at the investor statistics, which says that investors rather read blogs than message boards or social network sites, you'd expect that public companies are using blogs as a tool to communicate with the investors. According to the statistics in the research of Sheryl Joyce companies are using blogs the least of all Social Media channels. Using blogs might be a solution to engage the investors to your company.

Chapter 4 | Results and Findings

Part 1. The Research

Results and Findings

Statistics on Social Media channels show that the 'Investors of the future' are already using Social Media today. People between the ages of 25 and 34 are the biggest group of Social Media users. In this group are the so-called 'investors of the future'. Most investors are at the age of 50 or above but if you ask these investors if they believe that Social Media will play an increasingly important role in investment decisions in the future, more than half of the investors answers with 'Yes'. This is a small group who are currently not using Social Media on a daily basis unlike the 'investors of the future'. This is why I believe Social Media will play an important role for IR in the future. The 'investors of the future' will be known with Social Media and will be alert for frauds and/or scams.

A good development, which is taking place at public companies, is that each year more companies are using Social Media. Twitter is the most common Social Media channel (67%) that is used for IR, followed by Facebook (45%). Public companies are open to the idea of working with Social Media. The consumers (70%) want to interact with the companies through Social Media.

StockTwits is currently the only Social Media channel for specific for investors. With more than 100.000 visitors per month you're able to say that this channel is a success.

These research results has led to a new product that Interactive Investors want to introduce to the Public Companies. Part 2 of my thesis will introduce and describe this product where I've worked on in the last month of my graduation internship. Interactive Investor has offered me a job to develop the full concept for this product starting February 2012.

Chapter 5 | Invedia

Part 2. After the Research: Investor Social Media Platform

Investor Social Media Platform

With the knowledge and the results of my research we started brainstorming on the opportunities for Interactive Investor. Interactive Investor has a lot of experience in Social Media and Investor Relations. They have worked with over 100 top companies in Asia-Pacific. Soon enough in our brainstorming session we knew what opportunities Interactive Investor had. Interactive Investor has the technical knowledge, recourses and connections to start their very own Investor Social Media Platform.

Invedia

We gave the platform the work name Invedia. Since this project is only in the brainstorm phase, and the concrete plans will start in February 2012, this is only the work name. It relates to Inv(estor Social M)edia). The platform is similar to Facebook. Companies are able to share news, photos, videos but most importantly: files. The idea behind the platform is that companies (Interactive Investor's clients) are able display the products, like IR-connect™, Interactive eFlashbook™, IR-Beyond and IR-Connect™, on the Invedia. In attachment 10 and 11 you're able to see how the products can be displayed. The platform contains the company's PDF's, e.g. annual reports, sustainability reports etc. These PDF's are categorized in folders.

Invedia Features

- Bulletin (attachment 8): On the Company bulletin you're able to see the news,
 presentations, photos and videos that companies share or upload. The bulletin is
 simular to the Facebook wall but investors are not able to place comments or
 bulletin updates. This is because of the fear that companies have of negative
 reponses.
- 2. Overview (attachment 9): The overview is simular to Facebook information. On this page you'll see the Investor Related information with sections as: About us, Share information (bought from a stock ticker reseller) and Contact Details. This page is simple and static (KISS: Keep it simple stupid)
- 3. Investor Reports: the PDFs are displayed in folders (attachment 10). When the investor opens the folder (attachment 11) he will see all the PDF's generated by Interactive Investor. In fact, these are the Interactive Investor products.
- 4. Presentation, photos and videos: are a gathering of social media channels. Presentation are embedded from SlideShare and videos are embedded from YouTube. When companies post a SlideShare of YouTube video on their bulletin it will display in these sections.

Invedia template

The template of a company profile contains and always displays:

- Company logo: The companies are able to upload a photo or their logo as an avatar/profile picture
- 2. Menu: contains all the features listed on the previous page. The menu will display underneath the company logo.
- 3. Company header: contains the information address, telephone numbers, email and follow button. With the follow button investors can follow a company (similar to like on Facebook). The company header will be displayed next to the company logo.
- 4. Today's share price: displays the share price of that day, this information can be bought from stock ticker reseller.
- 5. Basic information: contains standard company information as: founded, type, company size, industry and a link to their IR Website. The basic information will be displayed underneath the today's share price.
- 6. Sponsored: this contains advertisement from public companies who are looking for new investors.

Invedia future

I've been offered a job at Interactive Investor. I will start in February 2012. Invedia will be my main project. It's still in the brainstorm phase but starting February 2012 we will start the initiation phase.

Chapter 6 | Corporate Branding

Part 3. Rebranding Interactive Investor

Corporate Branding

Introduction

One of the assignments in my graduation internship was rebranding the logo and website of Interactive Investor. This project ran parallel to my research to the use of Social Media in IR. At first we defined the problems with the old logo and website. Before we've started the project we chose a project management methodology

Methodology

Choosing a methodology

We chose one of my favorite methodologies, which I also used in previous projects: "Scrum". Scrum is a methodology for software development. For this project we all knew that Scrum was the best method to use for developing the website.

What is Scrum?

Scrum is a methodology in Agile development, with three roles:

- 1. Product Owner: responsible for the business value of the project
- 2. <u>Scrum Master</u>: ensures that the team is functional and productive
- 3. Team Member: self-organizes to get the work done.

Scrum has four ceremonies:

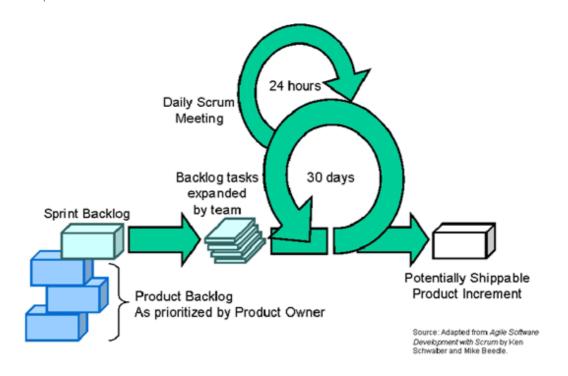
- 1. <u>Sprint planning:</u> meeting with the product owner to choose a set of work to deliver at the end of a sprint
- 2. <u>Daily scrums:</u> daily meeting with the team and scrum master to share struggles and the progress
- 3. <u>Sprint reviews:</u> the team shows the products owner what was completed in the last sprint
- 4. Sprint retrospectives: the team looks for a way to improve the product and process

There are three artifacts:

- 1. Product Backlog: contains the desired outcomes of the project
- 2. Sprint Backlog: set of work that the team agrees to complete in a sprint
- 3. Burn down chart: the work left to do versus time

The graph below illustrates the process of the Scrum methodology.

Teams work in cycles named sprints. The sprints we did were most of the time between 2 to 4 weeks. A sprint planning is held at the beginning of each sprint. At this sprint planning the team choose items to work on. These items are called the Sprint Backlog. Items in the Sprint Backlog are broken into details for each team member. Once the Sprint Backlog is finished the Sprint starts. During the Sprint each team member work on the items of his or her Sprint Backlog. During a sprint there is a daily meeting. In this meeting you discuss the struggles and the progress you have with items in the Sprint Backlog. At the end of each sprint the team delivers a finished product. The product owner makes a decision of when to implement the product. At the end of a sprint and the beginning of a new sprint the team looks into ways to improve the product or the process of the next sprint. This is done in the sprint retrospectives.



(Ken Schwaber, 2001)

Scrum Roles

	Name	Role at Interactive Investor
Product Owner	Susan Werkner	Managing Director
Scrum Master	Shirley Tat	Senior Digital Account Manager
Team Member	Ingrid Harso	Lead developer and designer
Team Member	Kasper van Merrienboer	Graduate Intern

Logo

Definition of the problem

The old logo of Interactive Investor looked too outdated (see image 1).



When the logo was resized, for example for

Social Media (e.g. avatars/profile pictures) the words "Interactive Investor" lost their readability. The tagline "Driving Investor Engagement" lost its readability with a width of maximum 150px. That's why we chose to remove the tagline.

The font that was used for the old logo was "Century Gothic", which is a very thin font as you can see in image #.

Based on these problems, Product Owner Susan Werkner, Scrum Master Shirley Tat and me as Team Member created requirements for the new logo using the MoSCoW method.

Must Have	Should Have	Could Have	Won't Have
- Modern 2.0 look	- Orange color	- Change font	- Tagline
- Better readability		- Grey color	
when resized			
- Icon			

Official Redesign

After many sketches the logo was shaped into the requirements as shown above. The result is shown here below:







Old logo. Image 3.

New logo. Image 4.

The new Look-and-Feel

Instead of redesigning a complete different logo I chose to stay close to the original logo. Interactive Investors has a big client portfolio that is known with the old logo. Therefore I kept the circle icon that is used for more design elements in the Interactive Investors branding.

The biggest change in the new logo is the font, which now is "Colaborate". I chose this font because it is corporate but playful at the same time. Corporate which represents 'Investor' and playful that stands for 'Interactive'.

In the old logo the words 'Interactive Investor' were horizontal combined. This is what caused readability problems when the logo was reduced in size. That's why in the new logo the words are vertically combined. The first 'i' from 'Interactive' and 'Investor' are combined to show that interactive and investor go hand-in-hand.

The new colors are a darker orange and black. This causes the new logo to be more striking and aggressive. If you look at the top of the page to image 3 and 4 you'll notice that the new logo gets more attention because of its colors.

Website

With the new logo finished we were ready to start on the redesign and development of the new website. For this project I worked together with lead developer and designer, Ingrid Harso.

Definition of the problem

Interactive Investor's old website was a very static website (web 1.0) with little or no design. There was no new technology that you normally see in web 2.0 websites and there was no integration with Social Media. The navigation was hard for people who were new to the website. There was no SEO strategy what caused bad results to search results in the search engines.

Based on these problems, Product Owner Susan Werkner, Scrum Master Shirley Tat, Co-Team Leader Ingrid Harso and me created requirements for the new website, again using the MoSCoW method.

Must Have	Should Have	Could Have	Won't Have
- Web 2.0	- New navigation	- Change font	- Flash technology
requirements	- Look-and-Feel	- Multiple languages	
- Social Media	according to the new		
Integration	logo		
- New technologies			
(e.g. ajax, jquery)			
- SEO			
- Full HTML			
- All Browser			
compatibility			

The requirements listed above are the site's global requirements. Requirements were made for each page, which resulted as the Scrum Backlog.

Official Redesign

See attachment 5 for the design of the old Interactive Investor's corporate website. See attachment 6 for the redesign of the Interactive Investor's corporate website.

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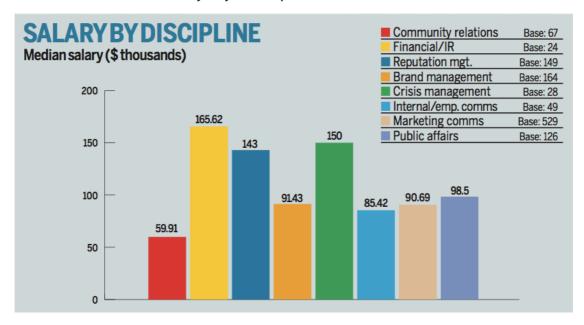
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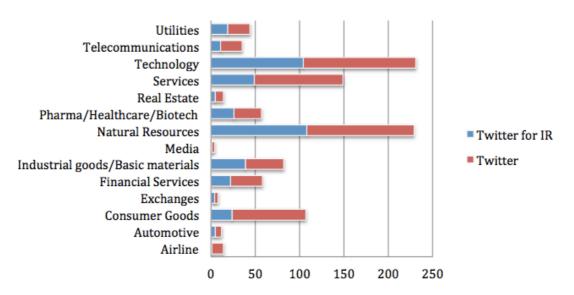
Research attachments:

Attachment 1. Salary by discipline



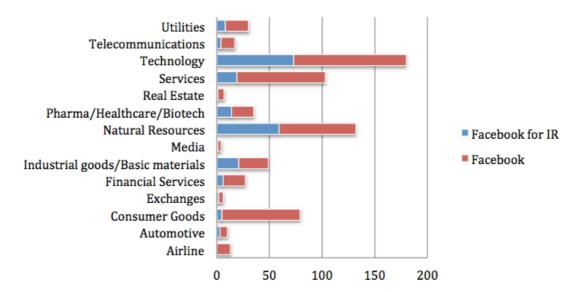
Attachment 2. Use of Twitter for IR

Use of Twitter for IR



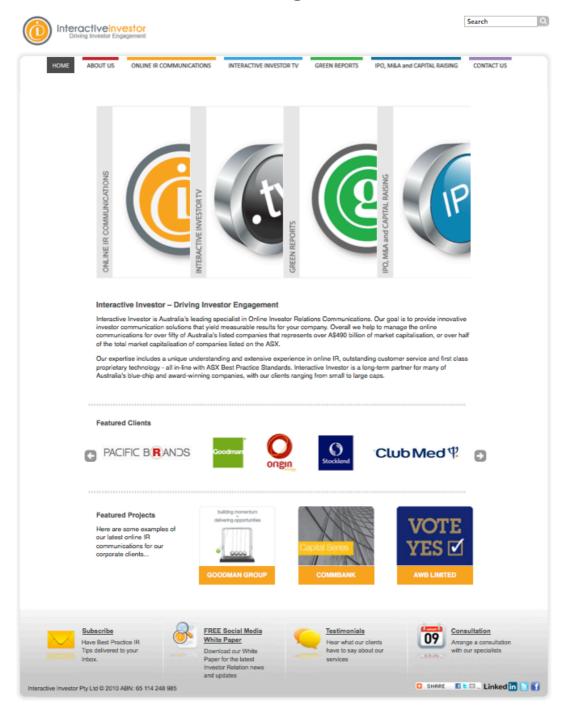
Attachment 3. Use of Facebook for IR

Use of Facebook for IR

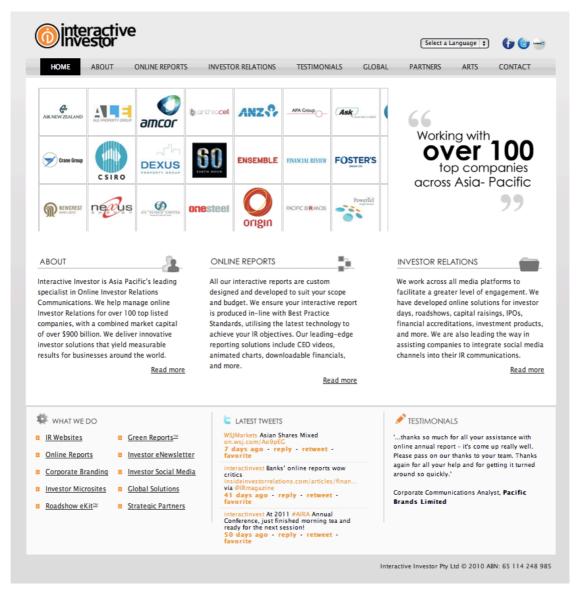


Corporate Branding Attachments

Attachment 5. Old Website Design



Attachment 6. New Website Design

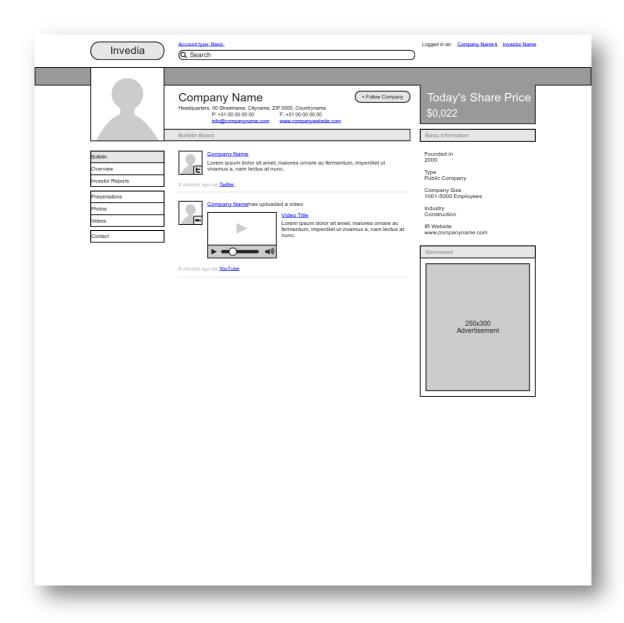


Investor Social Media Platform Attachments

Attachment 7. Unregistered Login Screen

Invedia	username password Login Remember me Forgot Password?					
Are	e you an investor? Sign up!					
	First name					
Investor Social Media	Last name					
Search Company Search	Email					
	Password					
	Sign up					
The following companies are already registeredSign up your company to join Investor Social Media						

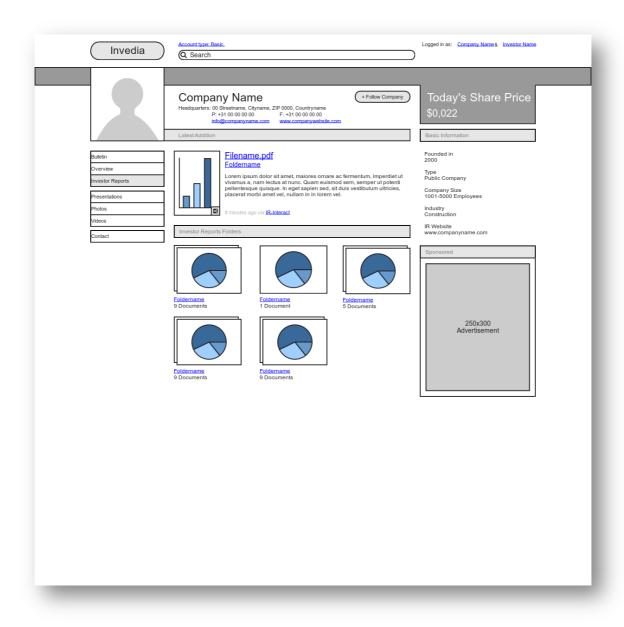
Attachment 8. Company Bulletin Board



Attachment 9. Company Overview



Attachment 10. Company Report Categories (II Products)



Attachment 11. Company Report Single Category

