

# Social Media and Online Marketing in the Insurance Industry – What's the Real Deal?

## Introduction



Welcome and thank you for participating in the 2011 BHBCo Social Media and Online Marketing Survey.

The purpose of this survey is to gather good, useful data to provide to the insurance industry concerning the actual use of online tools, ads, and social media in insurance agency and company operations. We are also using this to gather and share best practices covering the use of online marketing and social media.

We know that your time is limited, and we appreciate your thoughtful response. This survey consists of 28 questions and should take approximately 20 minutes to complete. (You may save and resume the survey, look for that option at the top of the page.) Once we have collated the results, we will share them with all the respondents and other industry groups. Please complete only one survey per agency or company.

Thank you again, and let us know if you have any other questions or concerns about the survey (or any of our other services).

This survey will be open until October 31, 2011.

---

## Basic Contact Info

1. Please enter your contact info. (Note: We will not share your identity or other personal information with anyone nor show it in the survey results. It will only be used to collate responses and to send you a copy of the survey results, via email, once the survey is complete.)

First Name

Last Name \*

Agency (or Company) Name \*

City \*

State \*

Email Address \*

Phone Number

URL

What is your position at the agency (or company)?

---

## Marketing

2. Which of the following traditional marketing platforms does your agency/company use?  
(Select all that apply.)

- |                                                            |                                                  |
|------------------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Yellow Pages                      | <input type="checkbox"/> Direct Mail             |
| <input type="checkbox"/> TV                                | <input type="checkbox"/> Postcards               |
| <input type="checkbox"/> Radio                             | <input type="checkbox"/> Billboards              |
| <input type="checkbox"/> National Newspapers               | <input type="checkbox"/> Street Signs / Placards |
| <input type="checkbox"/> Local Newspapers                  | <input type="checkbox"/> Other – please describe |
| <input type="checkbox"/> Industry Publications / Magazines | <input type="text" value=""/>                    |

---

3. The marketing efforts in the traditional marketing areas are:

- Part of a coordinated marketing plan with a budget.
- Part of a coordinated marketing plan without a budget.
- General marketing actions (or ad-hoc) and advertising with a budget.
- General marketing actions and advertising without a budget.

---

4. Which of the following non-traditional (paid or unpaid) platforms does your agency/company use for marketing? (Select all that apply.) \*

- |                                                      |                                                            |
|------------------------------------------------------|------------------------------------------------------------|
| <input type="checkbox"/> Google AdWords              | <input type="checkbox"/> YouTube                           |
| <input type="checkbox"/> Facebook Ads                | <input type="checkbox"/> Twitter                           |
| <input type="checkbox"/> LinkedIn Ads                | <input type="checkbox"/> Google +                          |
| <input type="checkbox"/> Website                     | <input type="checkbox"/> LinkedIn – free account           |
| <input type="checkbox"/> Email blasts                | <input type="checkbox"/> LinkedIn – premium (paid) account |
| <input type="checkbox"/> Facebook – Personal Account | <input type="checkbox"/> OTHER – please describe           |
| <input type="checkbox"/> Facebook Pages              | <input type="text"/>                                       |
- 

5. The efforts in the area of non-traditional marketing are:

- Part of a coordinated marketing plan with a budget.
  - Part of a coordinated marketing plan without a budget.
  - General marketing actions (or ad-hoc) and advertising with a budget.
  - General marketing actions and advertising without a budget.
- 

## Budgeting and Plans

6. Approximately what percentage (budgeted or not budgeted) of your expenses is used for:

Traditional Marketing

---

7. Approximately what percentage (budgeted or not budgeted) of your expenses is used for:

Non-Traditional Marketing

---

8. Do you have a documented marketing plan?

- Yes
  - No
- 

9. Do you have a documented Social Media Plan or Policy?

- Yes, as a part of the overall marketing plan.
- Yes, as a stand-alone document.

- No, nothing formal.
  - No, we do not use social media or online marketing.
- 

10. Does your agency/company allow employees to use social media during working hours? (You may select more than one response.)

- Yes, without limitation.
  - Yes, for defined segments of employees (e.g., producers).
  - Yes, but only during specific hours (e.g., lunchtime).
  - No.
  - We block access to these types of sites.
- 

11. Apart from marketing, do you use social media in your daily operations? If so, which platforms?

- |                                                      |                                                                          |
|------------------------------------------------------|--------------------------------------------------------------------------|
| <input type="checkbox"/> We do not use social media. | <input type="checkbox"/> Foursquare                                      |
| <input type="checkbox"/> Facebook                    | <input type="checkbox"/> Google +                                        |
| <input type="checkbox"/> LinkedIn                    | <input type="checkbox"/> YouTube                                         |
| <input type="checkbox"/> Twitter                     | <input type="checkbox"/> OTHER – please indicate<br><input type="text"/> |
- 

## Platforms

12. Which of the following platforms are in use at your agency/company?

- |                                                                       |                                                                          |
|-----------------------------------------------------------------------|--------------------------------------------------------------------------|
| <input type="checkbox"/> Website                                      | <input type="checkbox"/> Twitter account                                 |
| <input type="checkbox"/> Blog – on your website                       | <input type="checkbox"/> Multiple Twitter accounts                       |
| <input type="checkbox"/> Blog – not on your website (e.g., WordPress) | <input type="checkbox"/> Google Places profile                           |
| <input type="checkbox"/> Facebook Page                                | <input type="checkbox"/> YouTube account or channel                      |
| <input type="checkbox"/> Custom Facebook Page / Tabs                  | <input type="checkbox"/> OTHER – please indicate<br><input type="text"/> |
| <input type="checkbox"/> LinkedIn Company Profile                     |                                                                          |
-

13. How often do you update the platforms that you use? Please leave the platforms that you do not use blank.

	Rarely	Once a month	2-3 times a month	Weekly	Several times a week	Daily	Several times a day
Website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Blog on your website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Blog on a hosted site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facebook Page	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Custom Facebook Page/Tabs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
LinkedIn Company profile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter account(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Places profile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OTHER	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14. How many Likes, Followers, Contacts, etc., do you have for each platform you use? Please leave the answers for the platforms you do not use blank.

Website	<input type="text"/>	Twitter account (largest)	<input type="text"/>
Blog on your website	<input type="text"/>	(Total for all) Twitter accounts	<input type="text"/>
Blog on a hosted site	<input type="text"/>	Google Places profile	<input type="text"/>
Facebook Page	<input type="text"/>	YouTube	<input type="text"/>
Custom Facebook Page/Tabs	<input type="text"/>	OTHER	<input type="text"/>
LinkedIn Company profile	<input type="text"/>		

15. For the platforms that you use, does an employee within the agency/company maintain and update the site(s), or do you use an outside vendor to provide content, make updates, etc. (You may select more than one answer.)

	We do not use this platform	Internally maintained	Partially maintained with outside help	Content obtained from outside source	Entirely maintained by an outside vendor
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blog on your website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blog on a hosted site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facebook Page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Facebook Page/Tabs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LinkedIn Company profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twitter account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Google Places profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YouTube	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. Do you use any location-based platforms such as Foursquare or Facebook Mobile? If yes, please indicate which one(s).

No

Yes  \*

## Goals and Returns

17. What are your goals in using traditional marketing platforms? (Select all that apply.)

New leads

- Brand recognition
  - Organizational Image
  - Relationship building
  - OTHER – please indicate
- 

18. What are your goals in using non-traditional marketing platforms? (Select all that apply.)

- New leads
  - Improved prospecting
  - Brand recognition
  - Organizational image
  - Relationship building
  - Improving service / adding a new service channel
  - Research
  - OTHER – please indicate
- 

19. Does your organization measure the results of your traditional marketing efforts?

- No.
  - Yes, and we input them into our agency management system.
  - Yes, and we input them into a marketing or sales management system.
  - Yes, and we put them into a manual spreadsheet/document.
  - Yes, OTHER (please explain)
- 

20. Does your organization measure the results of your non-traditional marketing efforts?

- No.
  - Yes, and we input them into our agency management system.
  - Yes, and we input them into a marketing or sales management system.
  - Yes, and we put them into a manual spreadsheet/document.
  - Yes, OTHER (please explain)
- 

21. Do you measure the results or ROI (*return on investment*) of your marketing? If so how do

you do it? (Select all that apply.)

- We do not measure it.
- By the number of leads that are quoted.
- By the number of leads that are sold/issued.
- By the amount of agency revenue.
- By the number of fans, likes, followers on the various platforms.
- OTHER – please indicate

22. In round numbers about how much New Business does your agency/company write in an average month?

	Policies/Units	Commission
Personal Lines	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Commercial Lines	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Health	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Life	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Benefits	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>

23. Considering your answer above, how many leads and what percentage of policies sold and revenue generated would you estimate can be attributed to the following sources?

	Leads per month	Units/policies sold per month	Commission per month
Website	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Blog	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Facebook/Facebook Page	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
LinkedIn	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>
Twitter	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>

Google+	<input type="text"/>	<input type="text"/>	<input type="text"/>
YouTube	<input type="text"/>	<input type="text"/>	<input type="text"/>
Facebook Ads (paid)	<input type="text"/>	<input type="text"/>	<input type="text"/>
LinkedIn Ads (paid)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Google AdWords (paid)	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Last Questions – Sorting Criteria

24. What is your agency's/company's annual revenue range?

- less than \$500,000
- \$500,000–\$999,999
- \$1,000,000–\$2,499,999
- \$2,500,000–\$4,999,999
- \$5,000,000–\$9,999,999
- \$10,000,000–\$24,999,999
- \$25,000,000–\$49,999,999
- greater than \$50,000,000

25. How many employees are in your organization? \*

26. What are the approximate splits for your business, in %?

Personal Lines

Commercial Lines

Life

Health

Benefits

---

27. What agency management system do you use?

---

28. Do you use a third-party sales or marketing platform (e.g., SalesLogix, FSC Pipeline, etc.)?

No

Yes – please indicate which one

---

29. If there is anything else you would like to share with us (and with all other respondents), please take a few minutes to let us know.

What works great, what does not work at all, best practices and wastes of time – we want to hear about it.

---

Thank You!

Thank you for taking our survey.

You can expect to receive a copy of the results within sixty days of the close of the survey period.

If you would be willing to share your social media experience or even participate in a case study, please let us know.

And please do contact BHBCo if you have any other questions.

**BHBURKE & CO**

<http://www.bhbco.com>

860-399-8288

---

