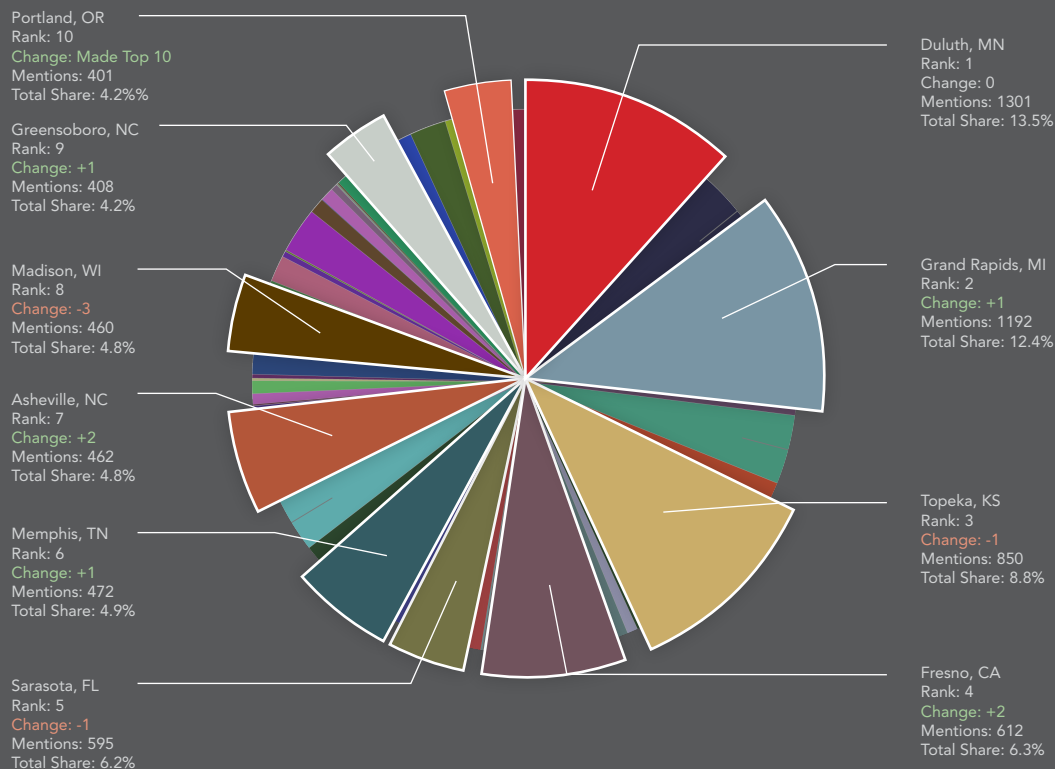


GOOGLE FIBER

Share of Voice Report // Update 3.24.2010

Steketee Greiner & Company analyzed over 90 cities across the US competing for Google's coveted ultra high-speed fiber installation. This report is a continuation of the report published 3/17/10 that measures activity across Conversation, Syndication, Presence, Involvement and Activation.

Conversation



Insight Courtesy of
Steketee Greiner & Co.

What the data shows

Out of the total number of cities from our research, a top ten list was compiled based on total share of voice around keywords pertaining to Google fiber tracked between 2/15/10 and 3/23/10. The top ten cities have not changed since the 3/17 report, with the exception of Baltimore, who was replaced by Portland. There is a shift in the rankings as Grand Rapids overtook Topeka for second place, while Fresno climbed two positions to fourth and Asheville climbed two positions to seventh.

Insight

Some cities improved their overall number of mentions with leading cities demonstrating the most diverse communication channels. This again supports the need for a comprehensive coordination effort across multiple channels and the need to incent followers to participate in conversations.

All population is based on 2008 Census Data

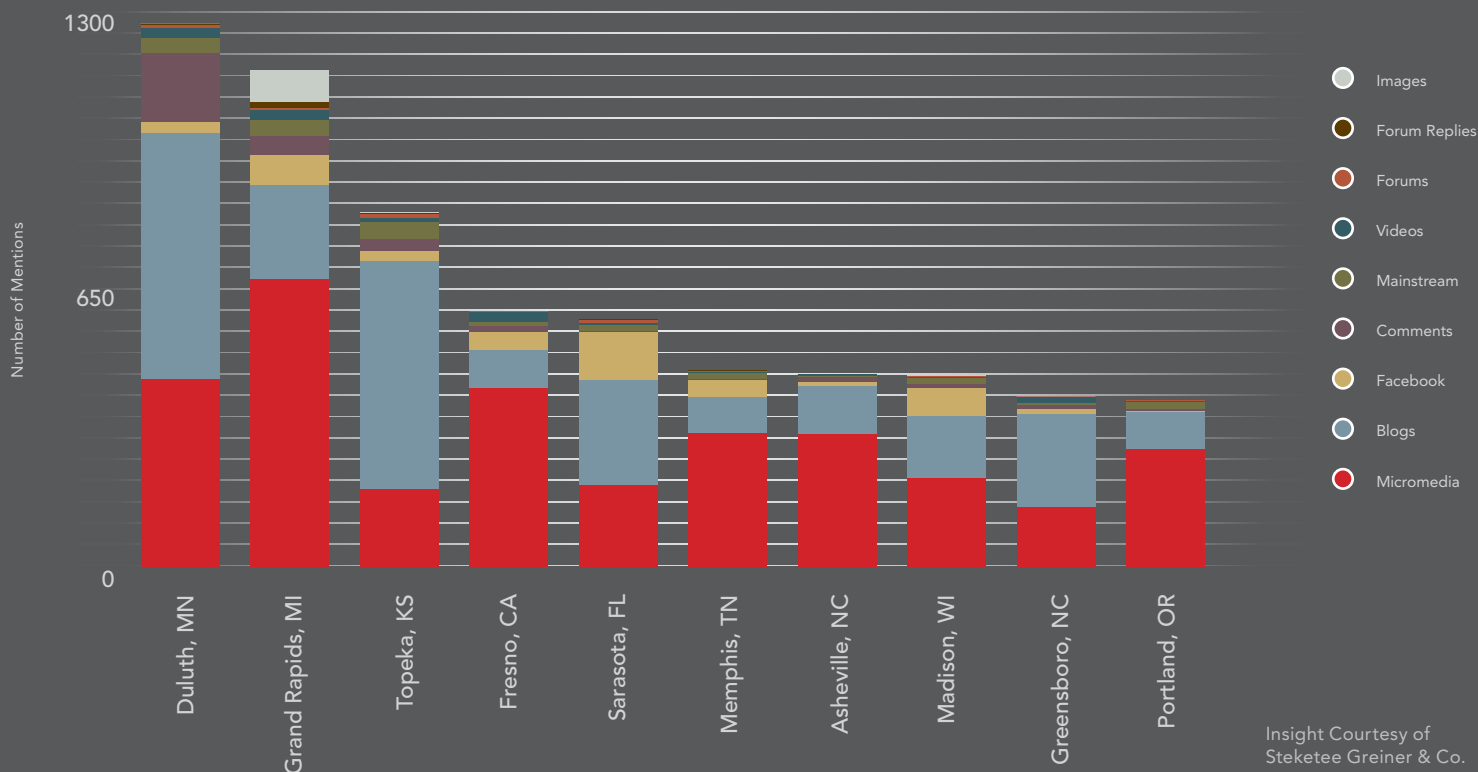
Social media mentions are based on keywords for Google fiber from Radian6.com between 2/17/10-3/23/10

All Facebook data is current as of 3/23/10 and only taken from the "official" fan pages

All data was current as of the creation of the report and accurate based on the sources and methodology used

Tracked over 90+ cities in the generation of these reports

Digital Syndication



What the data shows

Duluth continues to be the number one city since the 3/17 report. However, Grand Rapids has moved up to second place shifting Topeka to third. Other cities that gained include Fresno, Asheville and Greensboro to spots four, seven and nine respectively. Baltimore fell off the top ten list and was replaced by Portland.

Insight

Cities leveraging multiple platforms continue to maximize their digital exposure. As we noticed previously, having the most Facebook fans is not enough to garner the largest share of voice. Duluth excels in activating their fans across multiple channels with specific focus on blogs and micromedia. Fresno was able to jump two spots, with a 174% increase by increasing their presence in images, Facebook and blogs. Grand Rapids, which continues to have the highest Facebook fan base, significantly increased their syndication efforts through images and micromedia. Factors leading to Baltimore's fall from the top ten may include increased efforts by other cities, as well as decreased chatter across the digital channels on Baltimore's behalf.

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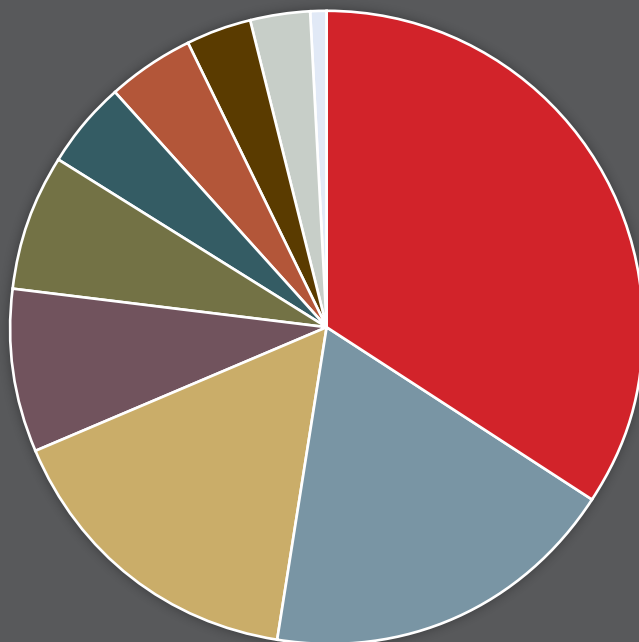
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Presence



<div>●</div> Grand Rapids, Michigan Rank: 1 Population: 193,396 Total Fans: 34,361 % of Population: 17.8	<div>●</div> Memphis, Tennessee Rank: 6 Change: +2 Population: 669,651 Total Fans: 4,590 % of Population: 0.7
<div>●</div> Duluth, Minnesota Rank: 2 Population: 84,284 Total Fans: 18,382 % of Population: 21.8	<div>●</div> Madison, Wisconsin Rank: 7 Population: 231,916 Total Fans: 4,250 % of Population: 1.8
<div>●</div> Topeka, Kansas Rank: 3 Population: 123,446 Total Fans: 16,003 % of Population: 13.0	<div>●</div> Asheville, North Carolina Rank: 8 Change: +1 Population: 74,543 Total Fans: 3,538 % of Population: 4.7
<div>●</div> Fresno, California Rank: 4 Change: +2 Population: 476,050 Total Fans: 8,215 % of Population: 1.7	<div>●</div> Greensboro, North Carolina Rank: 9 Change: +1 Population: 250,642 Total Fans: 2,908 % of Population: 1.2
<div>●</div> Sarasota, Florida Rank: 5 Population: 372,057 Total Fans: 7,003 % of Population: 1.9	<div>●</div> Portland, Oregon Rank: 10 Change: Made Top 10 Population: 551,226 Total Fans: 718 % of Population: 0.1

Insight Courtesy of
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What the data shows

Facebook fan activity was analyzed against total city population, as well as increases from our report dated 3/17. Grand Rapids continues to lead the overall Facebook fan count with over 34,000 fans at time of publishing. Duluth, Topeka, Fresno and Sarasota round out the top 5 with approximately 18,000, 16,000, 8,000 and 7,000 fans respectively. Grand Rapids was also the largest percentage gainer from last week, increasing their fan base by 15% over the last week (4,478 new fans). However, Duluth still has the largest fan base as a percentage of population at 21.8%. With the exception of the top three cities, fan bases are relatively low with all cities falling under 5% of total population.

Insight

As evidenced by Duluth's activities, total number of followers on Facebook is not necessarily the most important metric in the race for online share of voice. The more relevant number is the percentage of fan base actively contributing to the online conversations, not only on Facebook but also on all digital channels. Conversion to conversation is key.

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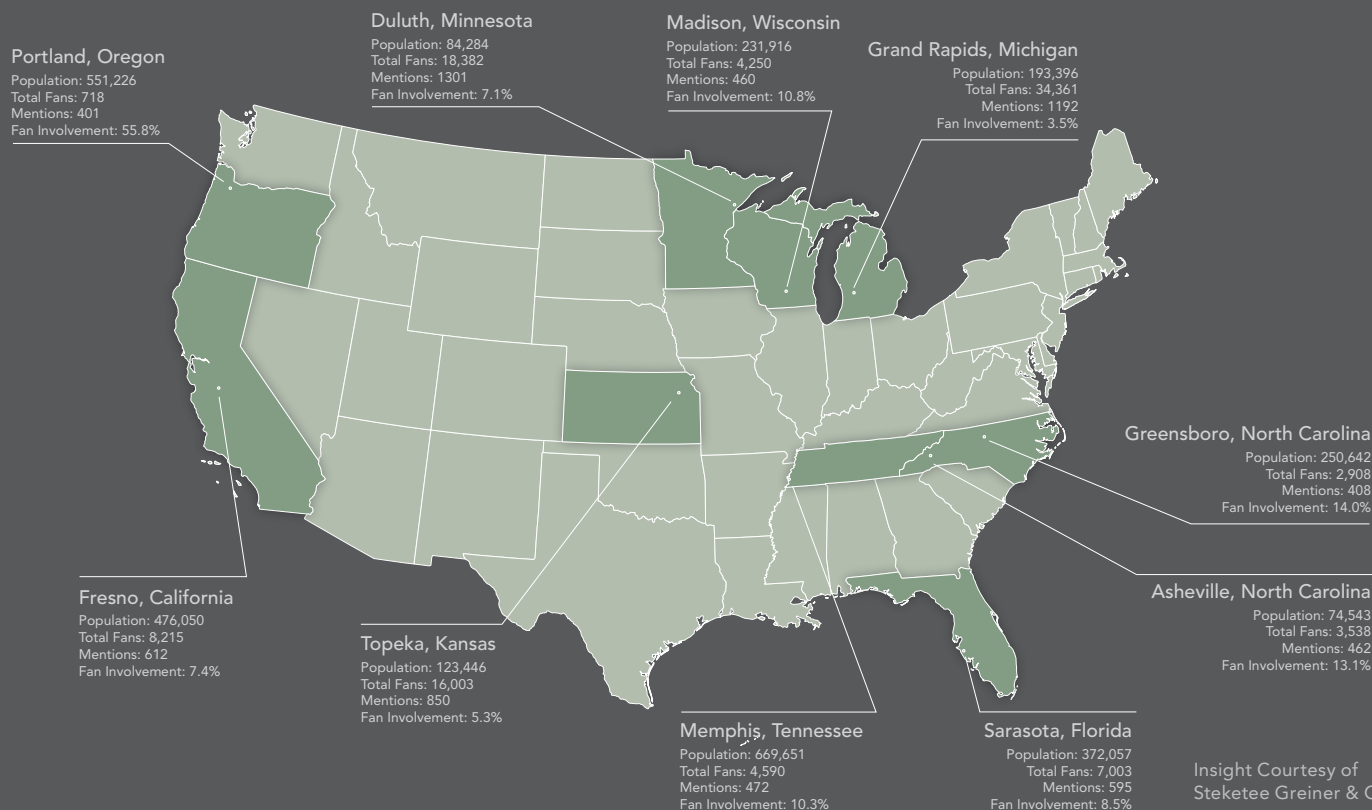
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Involvement



What the data shows

When comparing total Facebook fans to mentions, Portland has the most active fan base with 55.8% involved. However, they also hold the lowest fan base at 718. Greensboro has the next most active fan contribution with 14%, which shows a decrease in fan involvement from last week. However, that decrease should be considered in light of Greensboro's significant growth in fan base from 901 to 2,908. Memphis rounded out the top three with fan contribution of 10.3% for its 4,590 followers. The city with the highest number of fans, Grand Rapids, has the lowest level of mentions when compared to the number of fans: a level of fan contribution of 3.5%.

Insight

As fan bases increase, the primary strategy behind Facebook should include tactics for converting followers into "active" followers. As evidenced by Greensboro, if a city's Facebook fan page experiences significant growth without realizing content contribution by new followers, the active fan base percentage can drop significantly, which is a warning flag to strategists that the effectiveness of the growth campaign needs to be analyzed closely and a strategy to incent new follows to convert to "active" followers may need to be considered.

Again, a Social Relationship Management strategy targeting the most recent and frequent fans with specific insights on how, where and when to participate would increase the digital visibility and likelihood of fan engagement. Simple solutions include developing a common terminology across the entire campaign and employing hashtags whenever the local Google fiber initiative is discussed online.

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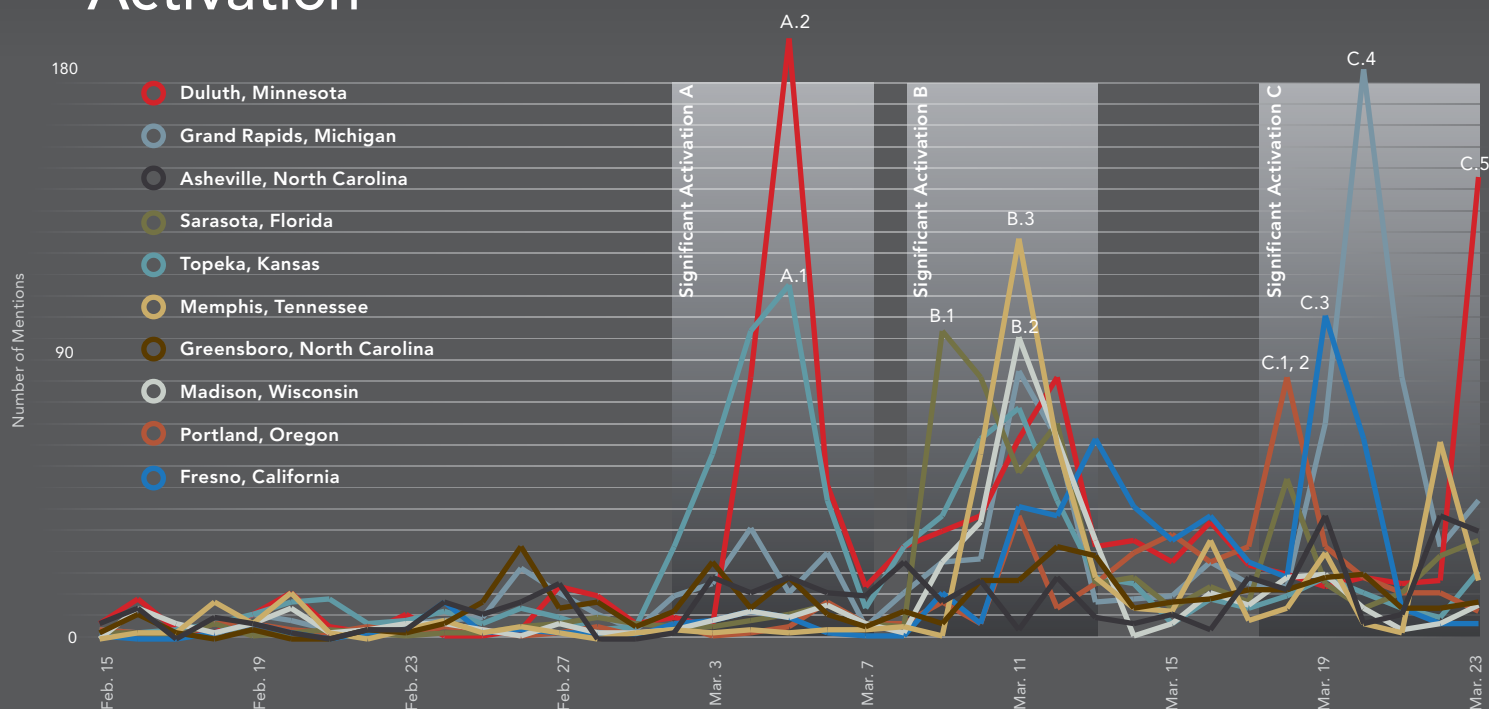
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Activation



Significant Activation A

- 1 Topeka renames itself "Google, Kansas"
- 2 Duluth offers to name first-borns "Google Fiber"

Significant Activation B

- 1 Sarasota titles itself "Google Island"
 - 2 Public meeting in Madison, WI
 - 3 Memphis joins Google fiber "Race"
- ** Gizmodo publishes article on Google fiber during this time period, citing multiple cities*

Significant Activation C

- 1 Portland City Council backs Google fiber pitch
- 2 Portland attempts "World's Longest Game of Telephone"
- 3 Fresno picks up "Google Fiber: Share of Voice Report"
- 4 Grand Rapids hosts "Google Fiber Flash Mob"
- 5 Duluth hosts "GoogleFest"

Insight Courtesy of
Stekete Greiner & Co.

What the data shows

The Activation timeline illustrates the trending of digital activity from 2/15 to 3/23 and shows how specific stimuli create spikes in conversation. Each peak on the chart corresponds to the rise and fall of 'buzz' around a correlating event or activity.

The two highest spikes for Activation occurred for Duluth and Grand Rapids. Duluth received a significant increase in online discussions when it offered to name its first-born children "Google Fiber," and Grand Rapids saw a spike in conversation when it hosted its "Google Fiber Flash Mob."

Insight

In most instances, online activity is directly tied to an event, which may include media activities, experiential campaigns or digital content releases. This strongly illustrates the need to plan any campaign holistically, accounting for both above and below the line communications channels. When a comprehensive approach is employed, any increases in share of voice should correlate directly to a specific activity. That said, it should be noted that increases in conversation include both positive and negative sentiment. It is strongly recommend that these increases in conversation be analyzed before reporting on the success of the campaign.

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