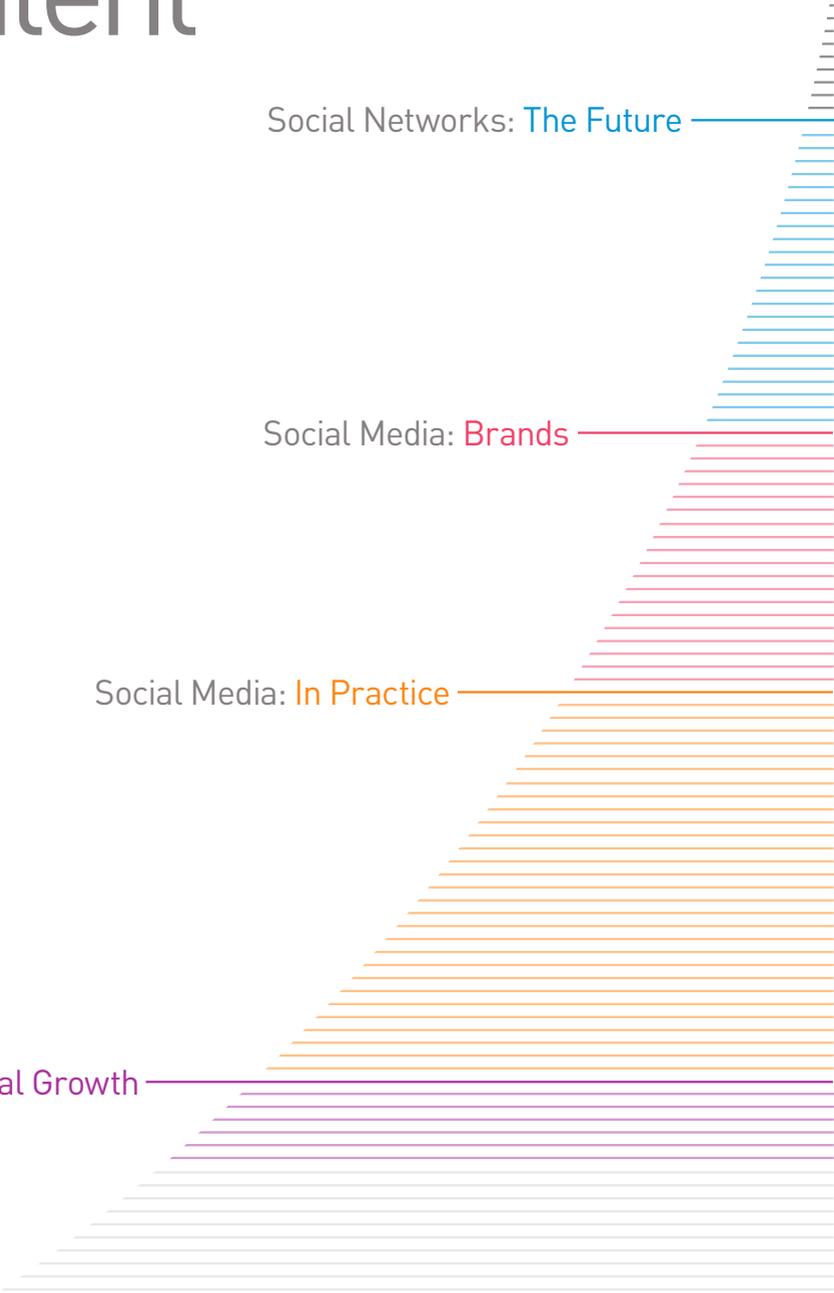


Putting Social Media in Context

Part 1

KANTAR

Content



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Foreword

Eric Salama

There isn't a day when I'm not on Twitter, Facebook and LinkedIn; there isn't a day when I don't learn something new. My view of the world, of brands, my experiences and purchase behaviour, my view of what I do and don't have in common with others are shaped by social media. Not to the exclusion of all else but certainly in addition to all else. Hundreds of millions of people around the world shape and are shaped by social media to a bigger or lesser extent.

For some social is about Yelp, TripAdvisor and review sites. In China, RenRen is the biggest social platform while Weibo services (China's Twitter equivalent) claims a combined registered user base in excess of 400 million. In Russia (arguably the most engaged social networking audience worldwide), Vkontakte is the largest social networking site and use of Twitter has grown three-fold in 2010 alone. Reports have social media spending accounting for approx.. 10-12% of total advertising budgets in 2011; And of course who can ignore Facebook, which has a reach greater than most TV networks in US and Europe combined.

Different consumers find their own ways of “doing social.” And we can expect this to evolve as the early adopters change their life-stages. Consider that the first Facebook generation are now recent college graduates and are out looking for jobs. How will that play out in what Facebook becomes? Or longer-term, if I am on Facebook, will my kids want to be?

We have reacted from a commercial point of view. Kantar has incorporated social media thinking and metrics in many of our core services and rolled out the coverage of businesses such as Cymfony; within WPP, GroupM has hired specialists and created social media focused agencies such as M80 and GMS Local; WPP Digital has invested in 4 social media partnerships in the past three years.

But ours is a never ending quest to help our clients and partners understand what is probable and tap into what is possible. To do so we must continually put

Social in context against what we know about other media and measure it with some of the rigor by which we evaluate other media.

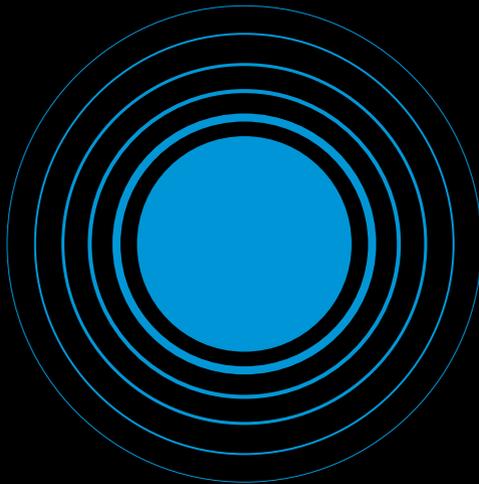
[This report is part of that quest.](#)

We have been studying what people think, feel, say AND do for a long time – through a marketing lens and through the social, political and trend research we carry out. We help our clients and marketers answer critical business questions like: How does social interrelate to television? Can I attribute offline purchase to social media? How does social media work in my overall marketing mix? What is the value of a Facebook Fan?

In the following pages, we have collected together some short thought-pieces on these topics. Hope you find it an interesting view on the phenomenon of social media. And please be sure to share your views on whatever social media sites you like!

Eric Salama
CEO, Kantar

www.twitter.com/ericshalama

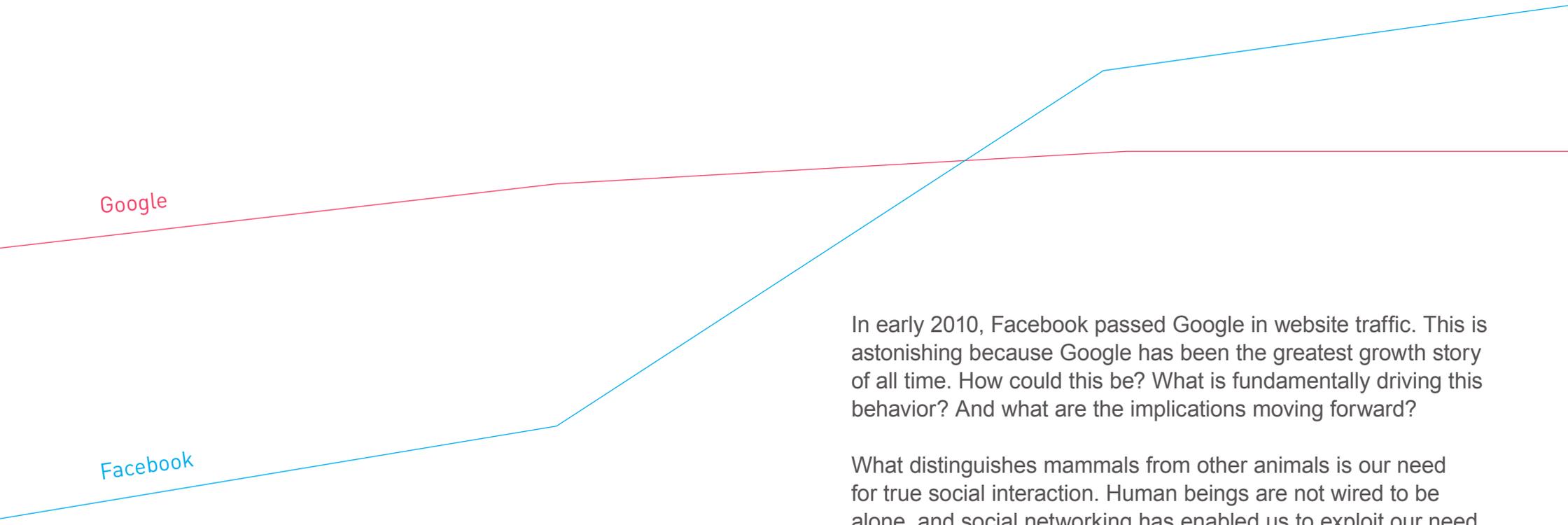


Social networks: The Future

Before we begin our exploration of Putting Social Media in Context, we must first understand what social means. What are social networks and why do people join them? How these social ecosystems function and evolve will have a great impact on social media and how brands should engage with consumers on these platforms.

The Promise of Social Networking





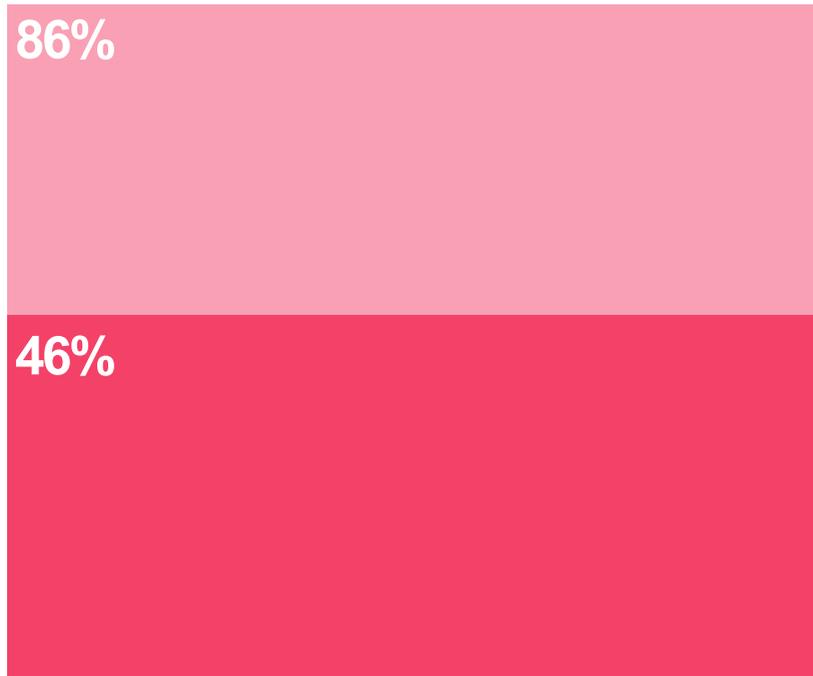
In early 2010, Facebook passed Google in website traffic. This is astonishing because Google has been the greatest growth story of all time. How could this be? What is fundamentally driving this behavior? And what are the implications moving forward?

What distinguishes mammals from other animals is our need for true social interaction. Human beings are not wired to be alone, and social networking has enabled us to exploit our need for community. The growth in social networking sites has been phenomenal. Morgan Stanley reported in December 2009 that time spent globally on social networking sites increased 82% over the previous year. 94% of US 18-34 year-olds use a social networking site, but so do 67% of 45-54 year-olds, and 55% of those 55+. Back in 2007, social networking represented about 1 out of every 12 minutes spent online, while today it accounts for 1 out of every 6 minutes spent online.

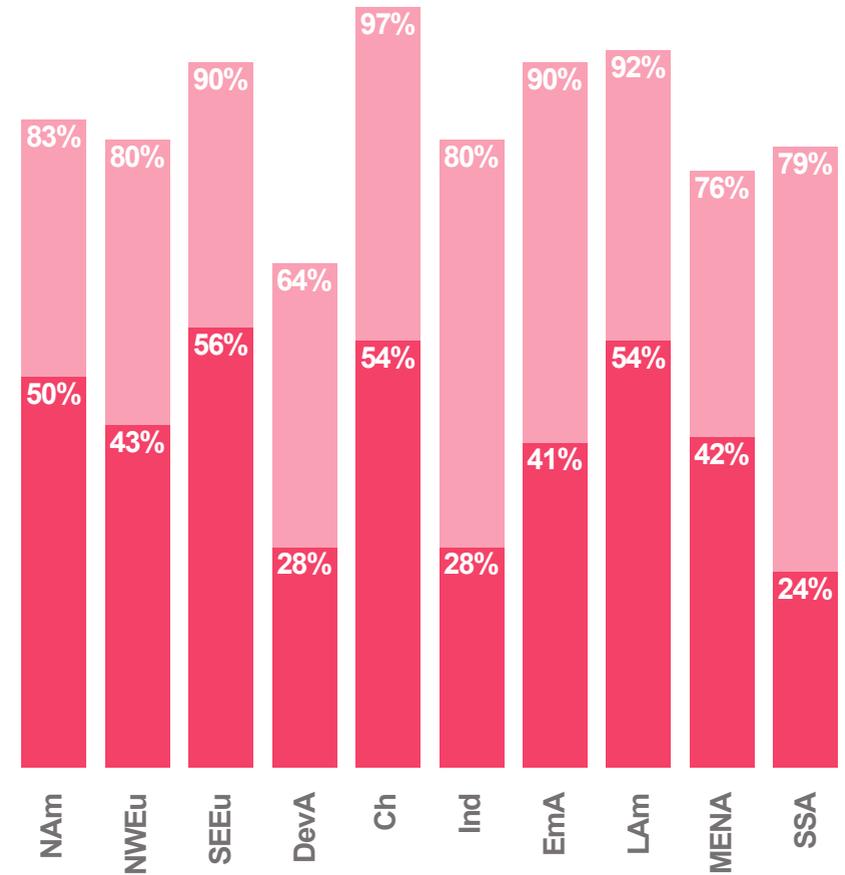
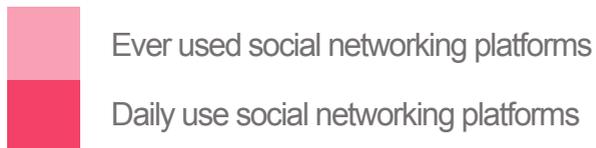
SOCIAL NETWORKING %

I1.01: Usage frequency of SN

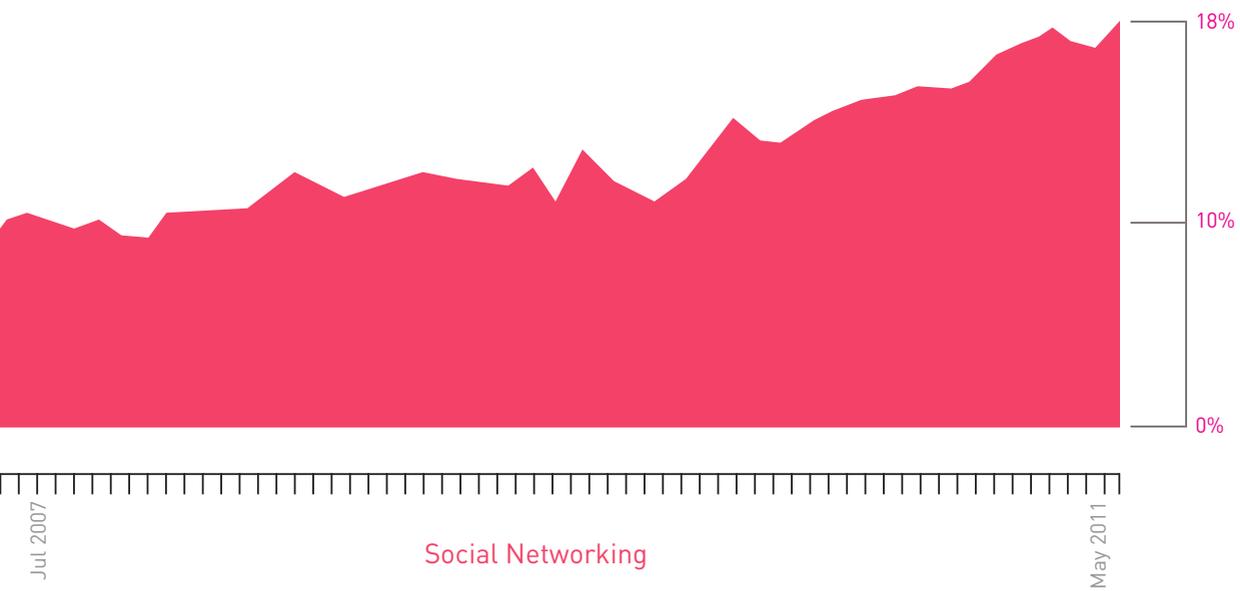
Bases: All respondents n= 48804



Global



Source: TNS Digital Life. Covering nearly 90% of the world's online population through 50,000 interviews with consumers in 46 countries



Share of Total Time Spent Online

This growth in online social networking is the extension of a number of general social trends Cheskin Added Value has observed. Each trend has implications for the future of social computing.

Trend No.1

Virtual is real

Virtual social interaction has become just as real, if not more so, than that in the physical world. Anyone who has an 8-14 year old is probably familiar with him saying he is playing with his friend, only to walk into the room and find him working his smartphone or videogame controller, playing online with his friend.

Improvements in social networking and mobile computing platforms, such as iPhone and Android, are fundamentally changing the ways people communicate with each other. The Economist reported that in 2002 the average Japanese mobile user spoke on his phone for 181 minutes each month. By early 2009 that had fallen to 133 minutes, the difference largely taken up by texting and accessing social networking sites. Communities or friends are no longer dependent on geographical proximity, but can socialize in a meaningful way online.

Implications:

- 1. Social groups that mirror real world relationships:**
The one-size-fits-all current Facebook-type network will decline. Google+ is trying to do this. We'll have networks of college friends, real personal friends, business contacts, fellow book lovers, Zynga game players, etc. People don't have one identity. We act differently with different people. So why have only one group of friends or one profile?
- 2. Ability to have real conversations in social networks:**
Social networks need to support side conversations and enable conversational threads with a smaller number of people. We'll have networks that have vibrant conversations, the way FriendFeed used to. Twitter's 140 character limit doesn't work well for real conversations.
- 3. Getting information only from those you truly trust:**
This was the original promise of social search - you would be able to take advantage of only the appropriate social subgroup to get answers to questions, receive suggestions, and trade information. Klout is a service that tracks the influence of individuals in social networks. It can be imported into other products (e.g. StockTwits) where you really want to know more about the person giving you advice. Social search is still hot, and the promise unmet as yet. Just because you are my friend doesn't mean I want your restaurant advice.

2009
0.8 ZB*

2020
35 ZB*

*Zettabyte = 1 trillion gigabytes

The Digital Universe
2009 - 2020

Growing by a factor of 44

Trend No.2

Growth in the amount of data produced

The average consumer has access to easy-to-use tools that allow him to contribute to the digital universe at no cost. YouTube now showcases 48 hours of video content every minute, up from about 6 hours in 2007.

Implications:

1. **Reduction of information overload:**

The digital revolution promised to empower us by putting the world at our fingertips. But instead we are drowning in information. Social networking should reduce information overload, not add to it. We need better filters by topic and source. Stumbleupon is an example of a first step in this direction. Human filters via social networking may prove to be the best – you can trust that your network will surface what's most important.

2. **Undermining of the authority model of news sources:**

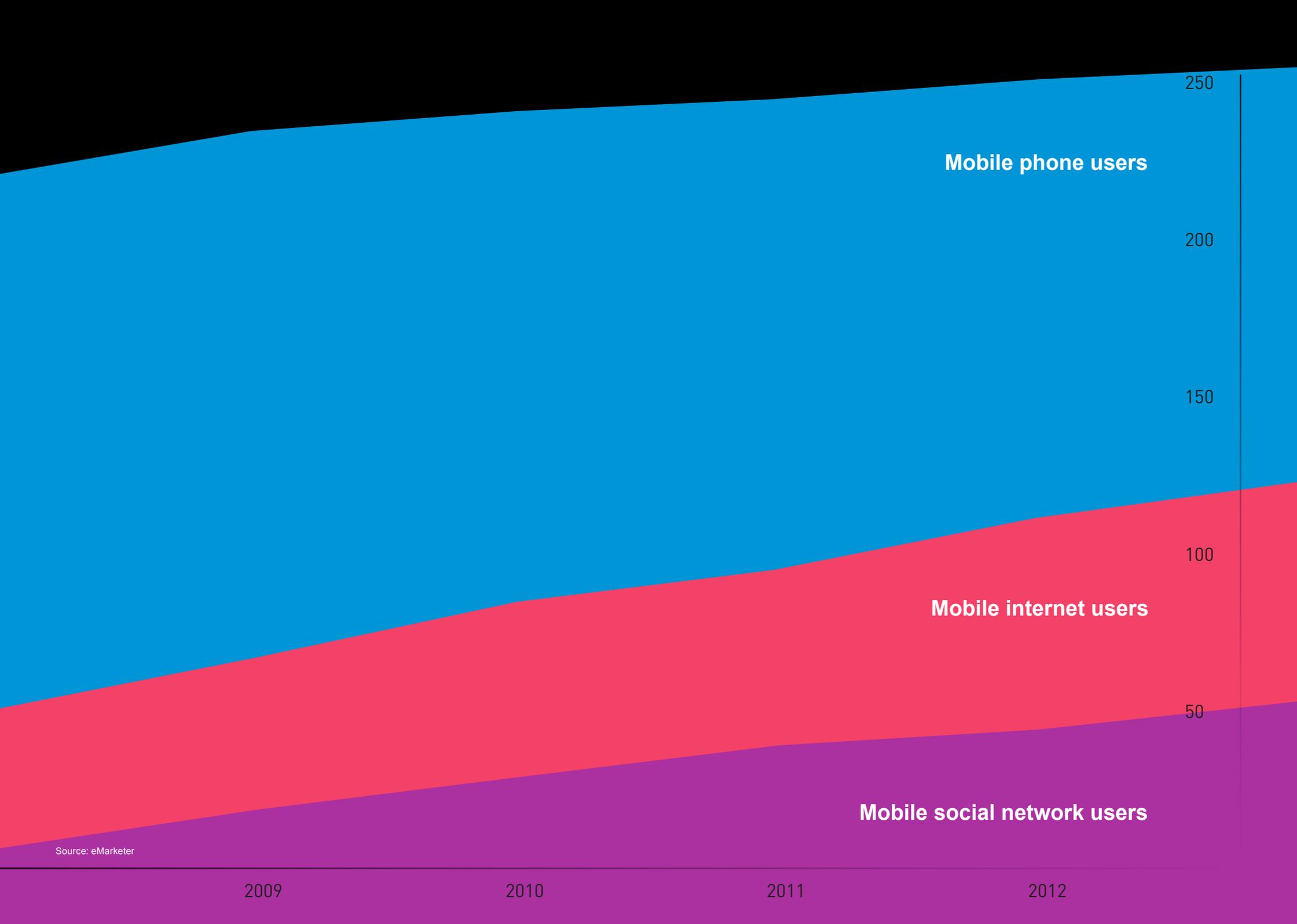
Newspaper and magazine circulation and TV viewership are plunging. Newsweek Magazine was sold for \$1. Immediate posts provide more up-to-the-minute information. The latest information was available on the web about Hurricane Irene or the earthquake in Japan when official sources had little or old information

3. **Integration of different social networks:**

You'll be able to easily track and find posts across different networks and email services. Right now, if you communicate with people on Facebook, LinkedIn, Twitter, texts and email, it's hard to remember which service you need in order to respond to someone. Smartphones do this when they allow you to get text messages from someone on any network.

4. **Emergence of non-text searches:**

With the exploding volume of images, sound and video, many new ventures are experimenting with ways to search this rich content. PhotoSketch finds pictures that roughly resemble anything you draw. Imprezzo matches images you submit, ranked from best to worst fit. Shazam has already become profitable searching for a song when you record a few bars.



Source: eMarketer

2009

2010

2011

2012

250

200

150

100

50

Mobile phone users

Mobile internet users

Mobile social network users

Trend No.3

Increase in mobility

We're traveling, commuting and spending more time away from our home and office. Yet the need to stay connected to our communities and friends hasn't lessened. Although mobile phone penetration in the US is leveling off, we are seeing rapid growth in mobile Internet users and mobile social network users.

Implications:

1. Augmented reality becomes real:

Augmented reality apps allow the user to point their mobile phone toward a street and visually view data associated with that location. Layar is an augmented-reality browser that delivers ATM locations, restaurant information, and more on the phone's screen as users point the camera at their surroundings. Friends can tag locations with information for others.

2. Geolocation data will be more widely used:

Despite privacy concerns, if people get value from letting mobile phones and apps have access to their location, they will share that data. More apps will become location aware, e.g. Flixster to find the nearest movie theater or realtime traffic updates.

3. Speech-activated mobile tools leverage normal human interaction:

Google Voice allows the user to dictate a text message and send it without typing on a mobile phone keyboard, and Android phone provide speech to text for many apps. As people continue to multi-task while mobile, we will need to make it safer and less distracting.

Trend No.4

Increasing transparency of personal information

Privacy is primarily a process of boundary management. Even teens care about online privacy, according to Danah Boyd, a social media researcher at Microsoft. PEW reports that “the majority of teens actively manage their online profiles to keep the information they believe is most sensitive [hidden from] strangers, parents and other adults.”

One teenager Cheskin Added Value talked to said: “The way my friends and I see it, Facebook is a closed network. It’s a network of people and friends that you trust to be connected to, and to share information...because you either approved or added each person to your network.”

Implications:

1. **The ability to set different groups of “friends” will solve many privacy problems:**

Privacy is about control of the audience. If we know that only close friends will see this photo, many privacy concerns are assuaged. If a friend sends that private photo on, the social consequences are the same as if he verbally told a secret confided to him – and that is a human behavior issue, not a technology issue.

2. **Online anonymity is declining:**

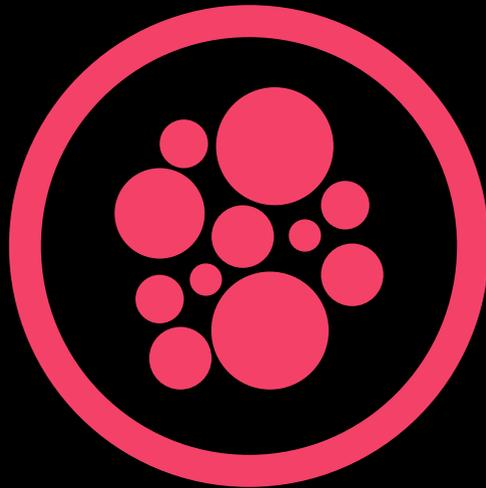
As people use multiple social media sites they leave behind information that someone can piece back together to identify them. It is becoming more difficult to mold an online persona that differs from the offline world. A basic shift to greater online openness is under way.

Conclusion

General social trends are playing out on the Internet and influencing the future of social computing. The killer app of the Internet has turned out to be social networking, by enabling our fundamental human need for being connected to others. Understanding these needs gives us the tools to predict the promise of social networking and the implications for its future evolution. Virtual is real, and will continue to be even more so with augmented reality and other new technologies. The amount of data on the Internet will continue to grow exponentially, especially as images, music and video proliferate. People are becoming more mobile, both within and outside of the home and workplace, and the mobile phone has become the dominant computing platform on the planet. Privacy will become increasingly important, and increasingly difficult to protect. These four trends will combine to create a highly complex and dynamic social environment.



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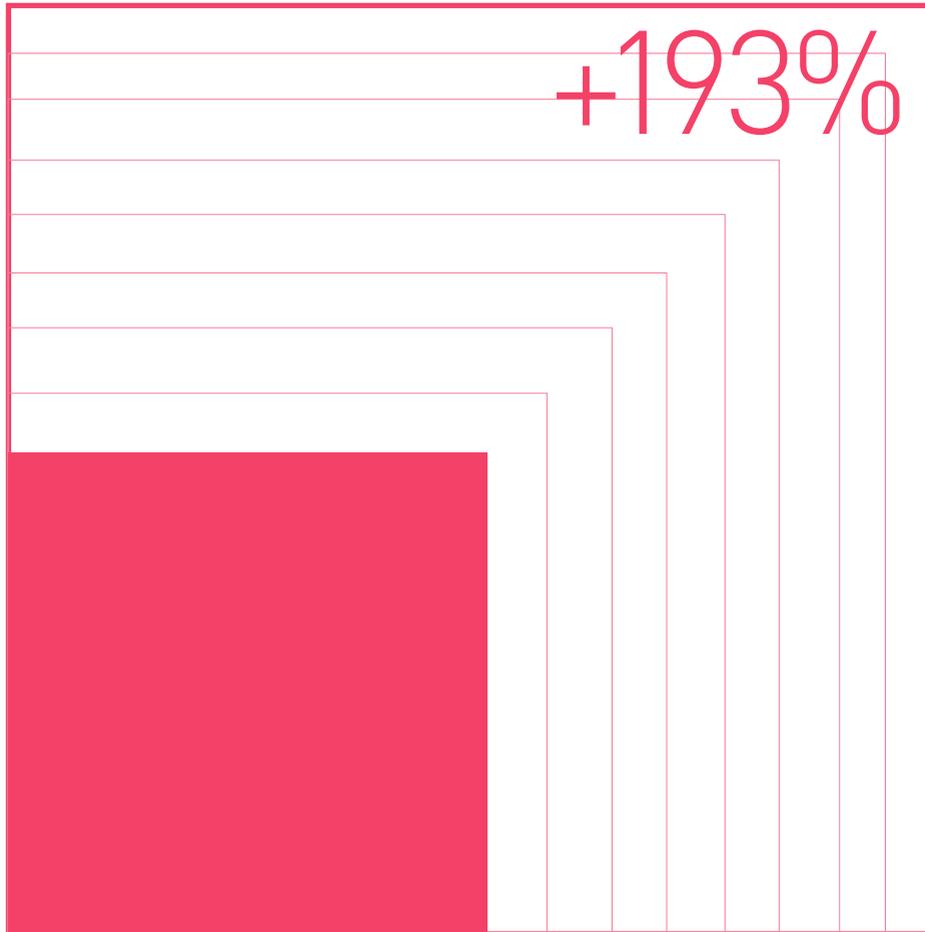
Social Media: Brands

It is understandable that brands want to leverage the power of social media to connect with their consumers. But what is the best way to do this? As it turns out, social media does truly need to be EARNED and the strongest brands must put effort into making social media work for them.

The Future of Social for Brands



Fan pages: impactful, and growing in scale



Brands are increasingly aware that fan pages can attract large audiences and build brands. More and more people are signing up to fan pages and social media feeds around the world. A typical Facebook fan page has almost tripled in size in the past year (the average increase across all Facebook fan pages was 193% according to Socialbakers, a social media measurement company).

Separate learning from Brandz has made it clear that fan pages are not right for all types of brands, but can be really successful when run well. The relevance of fan pages varies by country, category and brand type. Brands are obviously more likely to build large fan bases in countries where there are large numbers of social media users. Beyond that we have seen that social media users in some countries such as Korea, Brazil and China are particularly likely to follow brands in social media. Some categories such as IT software/ hardware, diapers, telecomms, mobile phones and cars seem to attract more fans. And brands which are particularly creative and desirable are also more likely to build large fan bases.

Once a fan base has been established, there can be massive variation in how successful those pages are at deepening brand loyalty among fans. "Value of a fan" research conducted by Millward Brown and Dynamic Logic in partnership with the World Federation of Advertisers has shown that innovation and variety are key to fan page success. Brands will therefore need to keep content fresh and provide ongoing reasons to engage if brand effectiveness is not to fall over time. So how can they manage this?

Five suggestions for keeping fan pages fresh

#1

Encourage creativity

Think of page managers as copy writers, not email marketers. Whilst maintaining a consistent fan page “voice” is important, encourage page owners to experiment frequently with different post approaches. What works this month may not work so well in the future, so keep probing new areas to see what content sparks most engagement. News feed posts are the most viewed fan page content, so it is essential they maintain interest. Individual posts somehow need to add up to a cohesive whole and tell a story over time. Regular features such as a weekly or monthly competition can help mark the passing of time.

#2

Have fun with tech

Apps aren’t essential to a successful fan page, but they can certainly help. Social media enablers such as BuddyMedia offer many pre-canned apps which can be easily tailored. As other new features and technologies become available, brands should evaluate their appropriateness. For some brands, this might mean a viral app which encourages photo sharing. For others this might mean a device which takes advantage of geo-location capabilities to map fan base activities. Many social media users enjoy the latest new thing, so aim to demonstrate that your brand is at the cutting edge. Just one word of caution: don’t make your app so complex that no one can figure out how to use it! Think innovative AND intuitive.

#3

Keep on reaching out

Brands need to keep reaching beyond core fans to the friends of those fans. Not only does this increase the potential target audience, but this new blood will also bring new enthusiasm to the page. Facebook make this possible via ad units which can be targeted at friends of fans. This viral spread can also potentially be achieved by crafting posts or creating content elements that lend themselves to being shared. The Facebook and Twitter “share” and “retweet” mechanisms are simple, but fans/ followers are only likely to do this occasionally, when the post/ offer is exceptional, or when it will reflect well on them if they break this news to their friends.

#4

Aim for seamless social

Brands need to deliver a coherent story across multiple digital platforms. This already means juggling content on Facebook, Twitter and a brand website, and perhaps on YouTube too. In future brands may also want to extend their presence into Foursquare, Google+ and other networks. Brands need to make key decisions about whether to devise unique content for Facebook and other social sites, how much content to leave on their own website, how to manage Facebook fans alongside website and email marketing databases, and whether Twitter has a unique role or is simply a traffic driver for the Facebook page or the brand website. Some brands have chosen to integrate their Twitter feed within their Facebook page which can encourage some cross-fertilisation. Many permutations are acceptable, but a clear strategy is essential. Forums on websites have arguably become much less relevant, since these conversations are more natural in a Facebook or Twitter environment. While this means giving up some control, it increases the chances of viral spread. Viral video campaigns and social media are natural bedfellows. Old Spice and Dos Equis have shown how social media can enhance and build on already successful viral video campaigns.

#5

Integrate and enhance offline content

Beyond the digital space, brands also need to integrate their social activity strongly with other media and promotional activity. We have already seen some ambitious examples such as Smirnoff's "Nightlife Exchange Project", where a major TV and online campaign drove millions of global Smirnoff fans to interact via Facebook. Even in less extreme situations, social media needs to be aware of and reflect messaging from other channels to give those messages a chance to be amplified/ reiterated. Just posting the latest TV or print ad is an opportunity lost. Brands need to identify a social element in the ads and invite comment and discussion. Social can add a new layer, provide an additional back story about the making of, or provide an opportunity to flesh out a key communication point with further information.

The importance of measurement

Social media is now important to many brands, but measurement practices have not yet caught up. Still not many social media marketers fully understand the return on their investment. As well as behavioural measurement to understand audience volumes and engagement, brands should look to add a layer of attitudinal understanding; firstly to understand whether fan pages are achieving brand objectives, and secondly to gain insights into how the pages can be improved. Larger scale social platforms and campaigns should also be included in multi-media measurement studies. One recent study Millward Brown CrossMedia study for a European FMCG brand showed that Facebook and TV synergy was very powerful, especially for the younger core target. Only when social is considered in this wider context will brands fully understand social media's role in the media mix.

Summary

There are many exciting future possibilities in social for brands which understand their audience, identify what works among them socially, and deliver against that consistently with ongoing creativity.

For more of Millward Brown's social media learning, see the Knowledge Point "How should your brand capitalise on social media?"



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Twitter's emerging potential as marketing platform

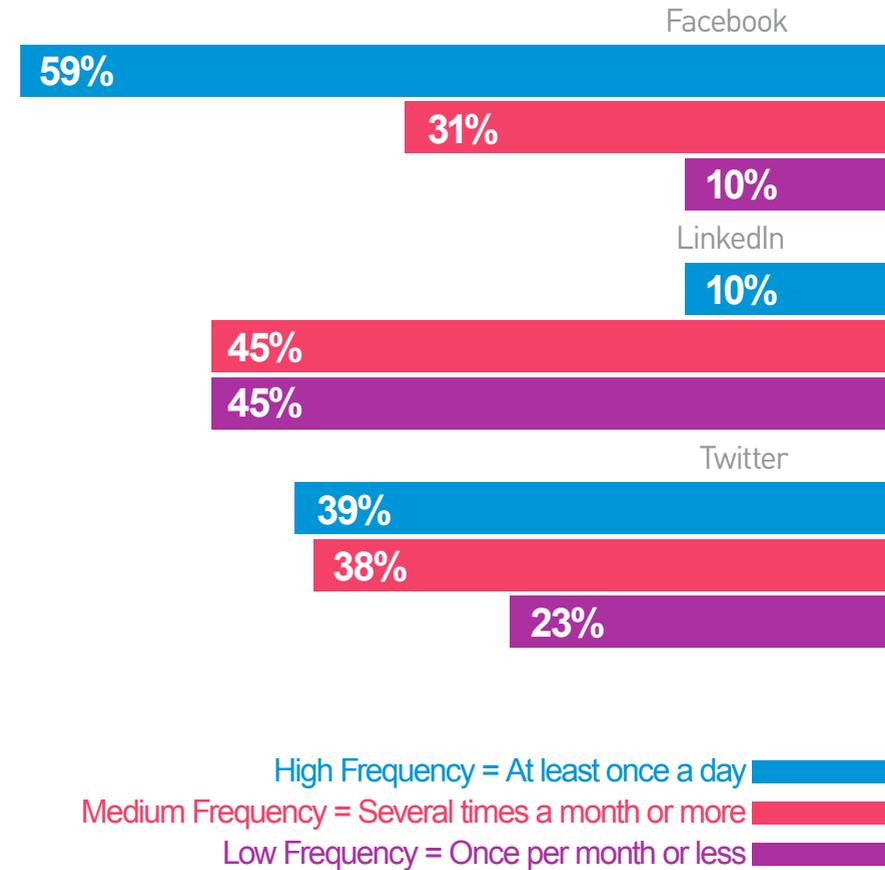
In June 2011, Kantar Media Compete presented at “Twitter for Marketers” in Chicago, a conference that featured leaders from a variety of industries discussing how to effectively leverage Twitter as a marketing platform. Speakers included executives from Twitter – CEO Dick Costolo and President of Revenue Adam Bain – as well as hands-on marketers who shared how they currently use Twitter to drive business results.

Surprisingly there was little debate among attendees and presenters as whether or not to launch campaigns on Twitter. They have clearly moved beyond the “Why Twitter?” stage and are now in the “How do I execute?” stage. Amazing to see this widespread acceptance of Twitter as a marketing channel considering the platform has only existed for about five years!

One stat shared at the event underscored how pervasive Twitter has become as an information sharing platform – **20,000 searches per second**. 20,000 searches per second shows that many consumers now actively use Twitter as a platform to find and engage with content. A recent study fielded by Kantar Media Compete corroborated this phenomenon:

~ 40% of Twitter users utilize the service daily

Frequency of Usage



Usage Location

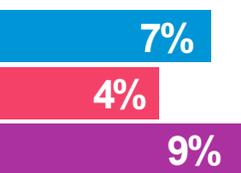
Desktop



Phone



Tablet



Twitter users are more likely to access the service via a mobile phone than Facebook users

The survey that Kantar Media Compete fielded shows a bifurcation on Twitter between “content producers” and “content consumers” greater than we see on Facebook. On Facebook, 81% of users consume AND produce content while only 56% of Twitter users do both. Twitter users are more likely to use the platform for either self expression (e.g. tweeting) or finding content, but not necessarily both.

You’d expect Twitter executives to lament having so many passive users, but Dick Costolo said otherwise. While a higher tweet/user ratio increases the likelihood of content going viral, it is not a necessity for the platform to be an effective marketing tool. Marketers, he suggested, can leverage the vast reach of Twitter to access hard-to-find consumer segments – whether or not those people are actually tweeting on the platform.

Kantar Media Compete data supports
Twitter's viability as a marketing channel

43% of Twitter users access the service via a mobile device compared to only 34% for Facebook.

As consumers increasingly embrace mobile devices, Twitter will become an even more attractive marketing platform. This is especially true internationally where mobile adoption is already much higher.

19% of Twitter users choose to follow a brand.

Clearly Twitter isn't simply a way to communicate with friends or learn the latest celebrity gossip; it's used to stay up-to-date on brand or company news. In fact, of those who "follow" a brand on Twitter or "like" a brand on Facebook, Twitter followers are much more likely to cite "receiving updates on future products" (84% to 60%) as a key reason for doing so. Savvy marketers will therefore start using Twitter as a primary channel for product updates and promotions.

56% of those who follow a brand on Twitter indicate they are more likely to purchase a product from that company compared to 47% of those who like a brand on Facebook.

There you have it; Twitter can effectively drive lower funnel KPI activity, making it a very attractive marketing platform.

What are the implications for Marketers?

Twitter's broad reach presents an opportunity to get brand or product messages in front of hard to reach consumer segments

As web activity continues to shift to mobile devices, Twitter will be an increasingly attractive marketing platform

Twitter is a compelling medium in which to communicate with consumers around new product offerings or brand news

Twitter can effectively drive lower funnel KPI activity

Study Methodology

Targeted at users observed visiting Facebook, Twitter, or LinkedIn from January to April 2011

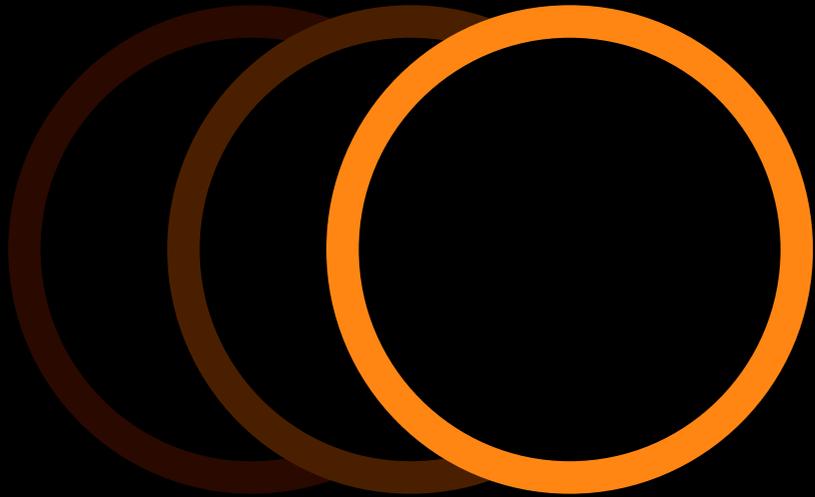
Survey fielded 4/19/2011 to 4/26/2011

832 total survey completes

Data weighted on age and gender to be representative of overall US internet browsing population

KANTAR MEDIA | compete

For more information
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mperlman@compete.com



Social Media: In Practice

Clients and brands are now asking: What now?
How do I measure the impact of my social media efforts? How does social media fit into my overall marketing mix and communications planning?
How do I leverage social media strategically?

Social Search

Introduction and background

The concept of looking for information and getting the opinion of neighbors, friends, family and co-workers – your community – is as old as the origination of communication. Today search engines hold the key to virtually anything you'd want to know about, and social media platforms allow you to connect with your community in ways previously unimaginable. However, both search engines and social media can, at times, lead to information and content overload which doesn't benefit either the consumer or marketer. What's the solution? Integrate social with search.

When social media pundits talk about putting social media in context, the notion of the “amplification” of a Facebook Like or a +1 on Google is one that is much discussed. With every fan on Facebook or Google+, brands have access to all the friends of each fan thereby gaining many new consumer touchpoints previously unavailable. Marketers and agencies alike are trying to determine what the true value and ROI of a Like or a +1 is. Once the full impact of social media is established, the optimal role that social media should play in the entire marketing mix can be determined.

When it comes to the role and the effect that social media has within search, the answer is fairly straightforward – a social signal next to your SERP (search engine results page) listing is an additional earned media impression that further acts as an endorsement of your brand.

Marketers should not view social signals (or endorsements) within search results simply as a merging of multiple data sources or platforms to provide the consumer with integrated data. This new wave of “social search” has immediate and potentially far reaching marketing and ROI impact.

It offers:

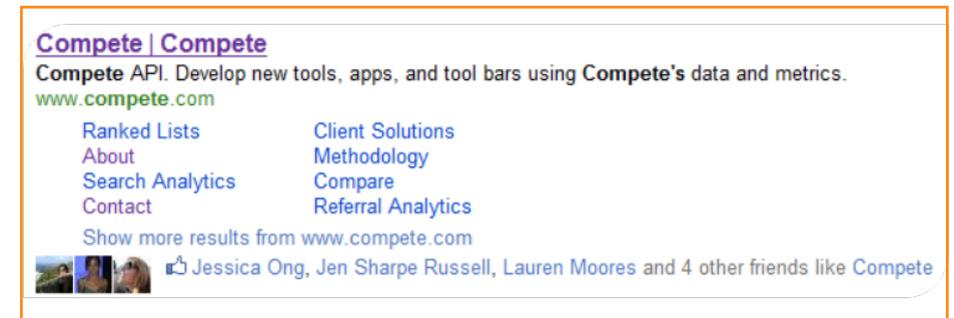
- **An immediate and positive impact on your organic ranking, leading to better visibility for your brand**
- **Incremental earned impressions on two of the largest search engines, leading to more visibility for your brand**
- **Endorsements for your brand from a consumer's network, leading to more engagement with your brand**

Social signals in search: Bing and Google

Bing and Google have both made substantial investments to integrate social networking activity into their search results. The hypothesis is a simple and intuitive one – people are likely to cut through the clutter and choose search results that people they know have endorsed. That initial consumer touchpoint offers the marketer an opportunity to then further engage with the new prospect.

Each engine approached their social search integration slightly differently. Bing's partnership with Facebook went live in May 2011, while Google created its own social networking platform in July 2011. In both cases, consumer participation is required – on Bing, users must “allow” Bing to access certain information from their Facebook account; on Google, users must sign up for a Google+ account.

To illustrate, Kantar Media Compete offered examples of what the social signals look like on both Bing and Google when searching on the term “Compete”:



Compete | Compete
Compete API. Develop new tools, apps, and tool bars using **Compete's** data and metrics.
www.compete.com

Ranked Lists	Client Solutions
About	Methodology
Search Analytics	Compare
Contact	Referral Analytics

Show more results from www.compete.com

 Jessica Ong, Jen Sharpe Russell, Lauren Moores and 4 other friends like **Compete**

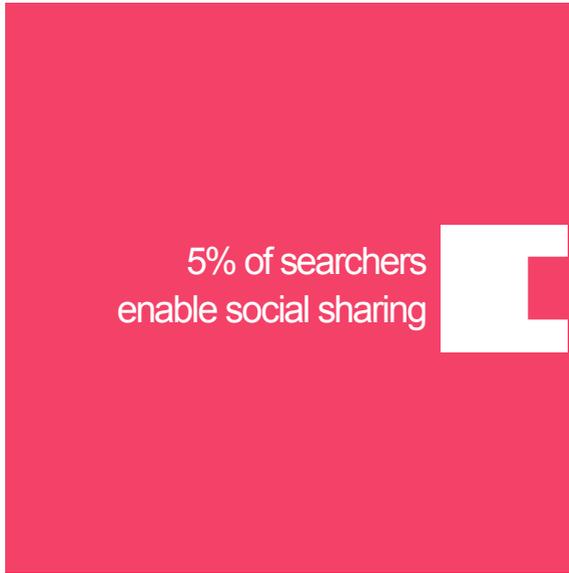


Compete | Compete 
www.compete.com/ 

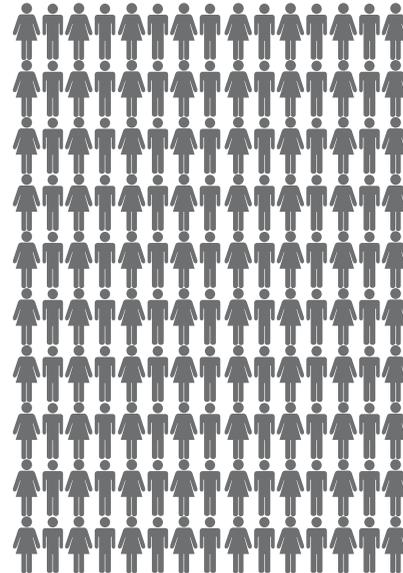
1 day ago – Drive your search marketing, business development, media planning and competitive strategy with the most powerful data on the planet.

 **Gregg Poulin** shared this

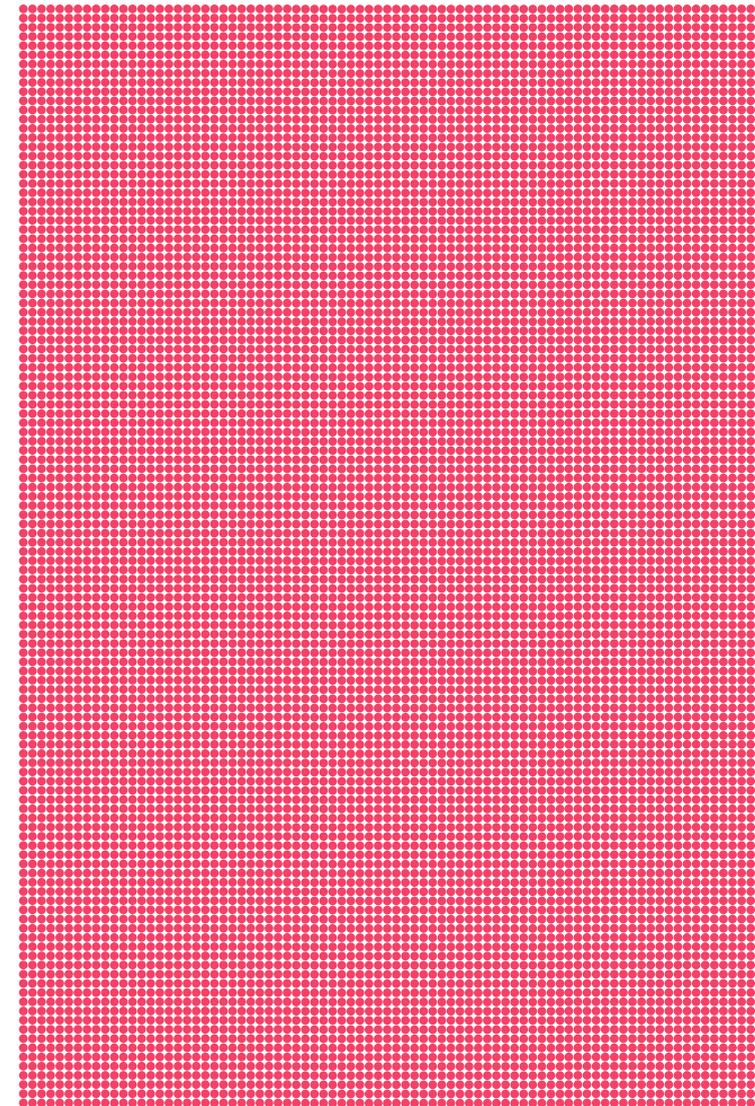
10 Billion queries per month



5% of searchers
enable social sharing



150 friends per searcher



75 Billion endorsed impressions on search

The potential reach of social signals

The potential “amplification” and reach impact is enormous. Just imagine this scenario: There are approximately 10 billion queries per month on Bing and/or Google. If even just a small percentage of those searchers have enabled social sharing and they have an average of 150 people in their network, the results are several billion endorsed impressions on SERPs. Social signals in search can produce tremendous impact.

CTR on SERP listings

9/1/11 - 10/15/11

CLICKTHROUGH RATE FOR CONSUMERS SEARCHING FOR IPHONES, IPADS, TABLETS, SMARTPHONES, AMAZON FIRE, AND WIRELESS CARRIERS

WITHOUT A SOCIAL SIGNAL

7%

WITH A SOCIAL SIGNAL (FB Like and/or +1)

14%

Do social endorsements work?

The potential reach of “social search” is exponential but what about the impact? Kantar Media Compete gathered data (September 1 - October 15, 2011) to assess whether Bing and Google’s strategy is paying off. The initial answer is yes.

Given the announcements about the latest iPhone and Amazon Fire during this period, many consumers searched on terms related to iPhones, iPads, tablets, smartphones, and certain wireless carriers. We know that consumers tend to rely on their friends’ opinions as part of their online research for these types of products and services. And, the data supports this point, as the click-through-rates (CTR) on SERP listings with a social signal were 2X greater than those without. While social signals is still a relatively new concept and its adoption is growing, this test case demonstrates that the potential impact on consumer engagement can be quite significant.

How do I harness the power of social search?

The tactics necessary to leverage the power of social media integration with search are straightforward.

The key is diligent monitoring and refinement:

- Include social sharing buttons as much as possible on your website, not just on your home page but on key product, brand, and content pages.
- Actively track the usage of these social sharing applications.
- Monitor how the presence of these social signals impacts your organic rankings.
- Track the likes and the unlikes on your Facebook page, as consumers can easily remove themselves (and their entire network) from your fan base.
- Many Facebook likes, as well as +1's, occur post consumer activity (often a purchase or interaction with service) so the implementation of a retention and loyalty strategy is key to the momentum of social search.
- Use every analytic tool available to measure the lift in search CTR, and even the lift in brand engagement (key performance indicators, such as “ad to cart”, or even a purchase) as a result of social signals.

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How to avoid common pitfalls of online listening research

Online listening is an increasingly important element of marketing research. Although its importance has grown, not all marketers leverage it to its full extent. In fact, Kantar Media Cymfony sometimes sees brands that limit the value they derive from research by limiting the scope of the questions that they ask. Questions such as, “How do consumers talk about my brand compared to my competitors?” or “How does Social Media validate our current understanding of our market?” or “Is target Group A less loyal to our brand?” are pertinent. This strict focus on brand monitoring or data validation, however, may not answer the most valuable business questions that are driving the “ask”. And, marketers can lose important opportunities for discovery if their research focus is too narrow.

Avoiding these types of common pitfalls is critical for marketers who want to maximize the value of their research. A case study for the hypothetical brand, SmileBrite toothpaste, will guide us as we examine three common missteps marketers make when using online listening research and then show how a different orientation can yield more powerful insights.

The SmileBrite team has just begun using online listening research and they identify three basic business questions they want to answer based on the research:

1

Why do shoppers buy SmileBrite?

2

What are my core SmileBrite consumers – W18-34 – talking about in Social Media?

3

What are SmileBrite consumers saying about SmileBrite on Facebook and Twitter?

To answer their first business question, the SmileBrite team looks only at brand level information. The data they examine shows reactions to their brand and to their competitors – Colgate, Crest, Aquafresh and more. It focuses solely on experience with the brand and the data set is finite. Certainly there are items that can be gleaned from this input; however, this is still a very limited perspective.

Online Listening Results

Brand Level

“I just go to the dollar tree and get my SmileBrite for a buck.”

“I used SmileBrite at my MIL’s house, and ever since then I am addicted to the taste of this toothpaste! I don’t swallow it, but I brush my teeth like 5 times a day because I love the taste.”

Let’s add product category level information to the mix and see if perhaps the SmileBrite team can expand their understanding. When we listen to consumers talking about category level topics such as toothpaste, fluoride, or clean teeth, the scope widens.

Category Level

“I’ve always wanted a toothpaste that is convenient to bring to the office.”

“I asked my pedi this. She said it was unnecessary. If you do use it, be sure to get it WITHOUT fluoride. It’s toxic in babies.”

“I need a toothpaste that is organic, but still tastes good. I hate those gritty toothpastes.”

Kantar Media Cymfony has found that only 15 – 30% of any category listening actually mentions the brand. It is critical, therefore, to examine the remaining 70 – 85% unbranded segment. With the addition of the category level listening information, the SmileBrite team can see patterns of behavior that point to unmet needs – and which would have been missed with only brand level input. These broader insights can help the team be forward-thinking in the recommendations they make as they consider those unmet consumer needs.

Lesson 1:

Avoid focusing on only branded conversation

By initially looking only at the brand landscape, the SmileBrite team limited their insights. If they had not added category level listening, they would have missed significant insights that could power new offerings or revenue streams.

Having learned a great deal about why consumers buy SmileBrite and what their needs are within the larger dental health category, the team moves on to their next business question: What are SmileBrite's core consumers, women between the ages of 18 and 34, saying in social media.

For the SmileBrite team, this question would traditionally be answered using their go-to segmentation approach. That's how they have traditionally approached market research and they know it's an accepted method. But, they've been doing their research and realize that while using segmentation is an effective way to delve into social media data, social segmentations should be based on mindsets, opinions, and behaviors that are stated in consumer language and not on traditional research notions about those segmentations. SmileBrite used this social media approach to segmentation and found it to be an even more powerful tool because it's not biased by survey language or methodology and it's not limited to pre-selected options. Instead, it's based on a thought, an action or a recommendation that comes directly from the consumer's voice.

Which statement below is one that the SmileBrite team is likely to find in a social media posting and which one is not?

“I am a 22-year old Caucasian female from Springfield, Illinois and I am more confident in SmileBrite’s ability to whiten my teeth now than I was before I saw the TV ad on Fox during American Idol.”

TRADITIONAL SEGMENTATION:
Age, Sex, Geography

“I got a bleaching kit from my dentist ... I got the 15% bleach because they said it’s the least sensitivity you can get, and I’m seriously miserable. Like omg ... I tried brushing my teeth with the sensitive toothpaste with fluoride and taking iubreprofen. Neither worked.”

SOCIAL MEDIA SEGMENTATION:
Behavior, Mindset, Language

Social media data is organic and unstructured. It’s not about demographics, geography or segmentation that a team has pre-determined. It’s based on consumers’ behaviors, their mindset and their language. That said, it can be segmented and can uncover rich new insights. We recommend that marketers:

- 1. Consider the ways that traditional and social data streams can work together, but don’t expect that one methodology will do the trick.**
- 2. Use Social Media to uncover how consumers experience and express brand attributes.**
- 3. Take the unexpected findings from Social Media and integrate them into Brand Trackers for structured evaluation.**

Our enlightened team at SmileBrite knew better than to allow their traditional research framework to dictate their social listening framework. They understand that the relationship between traditional research and listening outcomes are symbiotic, not formulaic. For example, they set up an equity tracker which showed that “reliability” is one of their key product attributes. Digging into social media, they began to understand how shoppers actually communicate the virtues of “reliability”. They used an aligned insights report to weave together equity data with organic consumer data. They used this language to write more informed and relevant survey questions instead of relying on traditional corporate speak. And, they were rewarded! Through their social media research, the team discovered that consumers trust the SmileBrite brand because it doesn’t contain a chemical present in other brands. This insight was then integrated into other brand tracker studies that were planned.

Lesson 2:

Do not approach social listening using a traditional research framework

Initially the SmileBrite team looked for information by age/sex demographics, but quickly realized that they could not expect to find that kind of information in consumer's use of social media. Instead, they modified their approach and used the strength of social media research to garner insights on consumers' behaviors and mindsets which allowed them to fine-tune future research.

The SmileBrite team's last business question to answer was, "What are consumers saying about SmileBrite on Facebook and Twitter?" While references to Facebook and Twitter litter the cultural landscape, the SmileBrite team now knows that Social Media is a vast universe which extends beyond both. And this is a crucial piece of learning.

Blogs and forums are critical to consumer perceptions about markets and products. In fact, blogs such as Engadget often appear on the first page of Google or Bing results as do "Mom" forums such as community.babycenter.com. The structure of each social media channel – from blogs to Twitter – influences the dynamics and value of the conversations they contain. While Twitter and Facebook provide real-time and often impulsive consumer insight, their structures do not lend themselves to detailed consumer analysis like you might find in a blog or to threaded conversations between like-minded forum members. That's why it's so important to evaluate Social Media channel-by-channel – you must understand how consumers use each respective medium in order to understand the best way to use each for insight and engagement.

Twitter

“I can’t find my SmileBright toothpaste in this crazy, huge store #annoyed”

THOUGHTS AT POINT OF PURCHASE

Each Social Media Channel Has A Unique Voice And Value



Forums

“Trader Joe’s had a really good All Natural version of SmileBrite toothpaste at 6 oz for only \$1.99 that I’ve been using for probably over 3 years ... During the time I’ve used this toothpaste, rarely did I have a canker sore, maybe 1-2 a year – if that.”
ehealthforums.com

LONGER, MORE DETAILED COMMENTARY
ABOUT A SPECIFIC ISSUE

Facebook

“At dentist getting some work done. Can’t believe how long this is taking!!! Will probably be late for my lunch appointment with Omri Duck.”

COMMENTARY DIRECTED AT CLOSED NETWORK, OFTEN EXPERIENTIAL AND ABOUT ONE’S DAY

Blogs

“An explosion of specialized pastes and gels brag about their powers to whiten teeth, reduce plaque, curb sensitivity and fight gingivitis, sometimes at the same time. Add in all the flavors and sizes plus ever-rising prices, and the simple errand turns into sensory overload,” reports Marketwatch. Indeed. So what do all the different options mean? Can you choose the wrong toothpaste?
blog.alice.com

THOUGHTS/QUESTIONS POSED
ABOUT A BROADER TOPIC

Lesson 3:

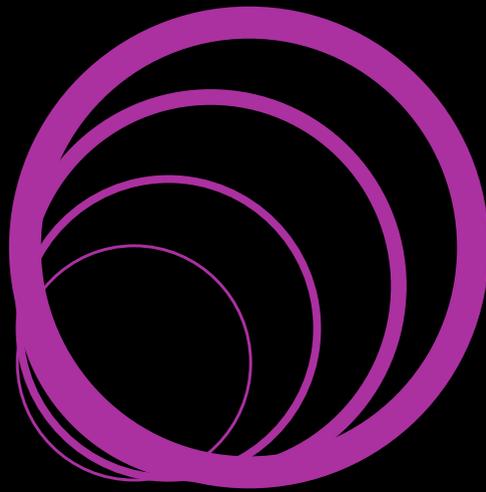
Do not define social media as Facebook and Twitter only

The SmileBrite team realized that individuals engage with their brand in different ways on different channels. They understood that they could not throw all channels into one social media “bucket” – because if they did, they’d lose the nuances of each channel and likely lose valuable insights, too. They stepped back and reevaluated, determined which channels matched their needs and then moved forward with their listening study.

At Kantar Media Cymfony, we see many clients at different stages of online listening research development. We know the value that social media insights can provide and how they can help marketers better understand their consumers’ needs, identify opportunities for product development and determine how to manage their brand. Those marketers who heed the lessons we’ve outlined will reap benefits by increasing the effectiveness of their research and its resulting insights.

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Social: Global Growth

Lastly we conclude with a perspective on the global social media landscape. As we shall see, Facebook is not the biggest player in the global space. Multinational brands that are looking to grow in emerging markets need to understand how the social ecosystem is different than developed markets to best leverage platforms to achieve marketing and advertising objectives.

Spotlight on China



Social network in China



1. Weibo/Sina Weibo users >200 million.

Sina weibo became the largest social networking site in China. The usage of Social Media is different in China than in the USA. The usage of Weibo outweighs the usage of SNS, renren or kaixin001, in China. Normally in the United States, the users of Facebook are much more than the users of Twitter.

2. From the media-consuming perspective, Chinese netizens take weibo more like a medium, not a social network platform.

Most of the users treat weibo as a channel to get the latest news and business information, not a platform to share their social related informations.

3. From the perspective of terminal, most of the weibo users apply mobile devices to surf weibo.

More than half of users currently accessing weibo through their mobile devices. As most users of online video websites or portals are PC users, Weibo has the advantage to attract more people by squeezing their fragmented time.

4. From the brand's perspective, the social media could be the paid-media or a nown-media, generating earn-media.

Social media has three basic functions: the platform for advertisements (paid-media), the channel for delivering brand news(own-media) and the original source to generate UGC(earn-media). Brand could apply the social media as the marketing tool, but as most of the majority official media already had their Fanpages, brand should be careful when delivering their information on social media.

The social media landscape in China

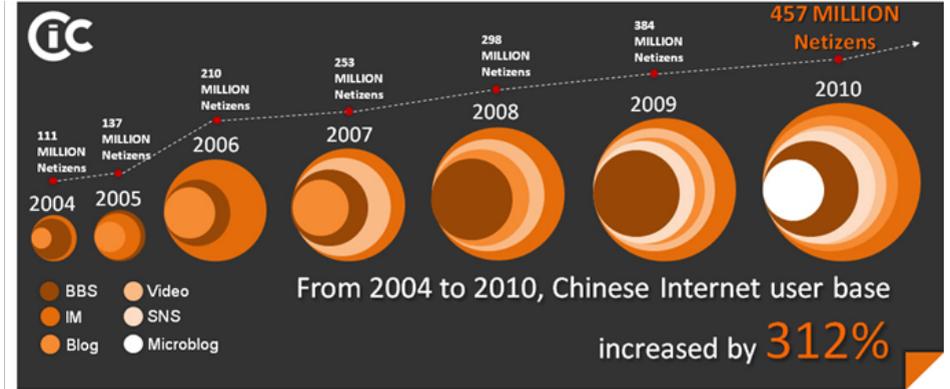
“China has the most complex, fragmented and developed social media landscape in the world with a unique online culture that requires its own specialized understanding.”

Sam Flemming, CIC Chairman and Founder

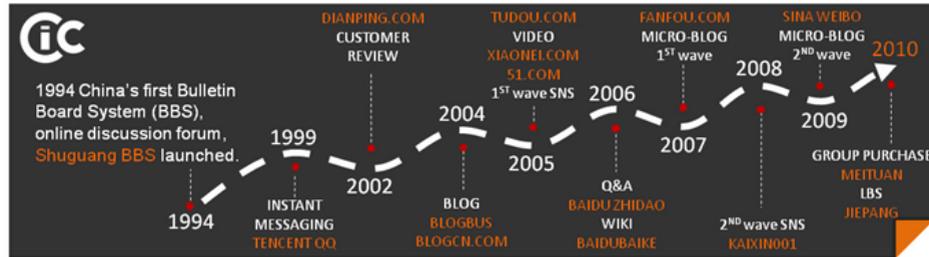
CHINA & WORLD NETIZEN POPULATION



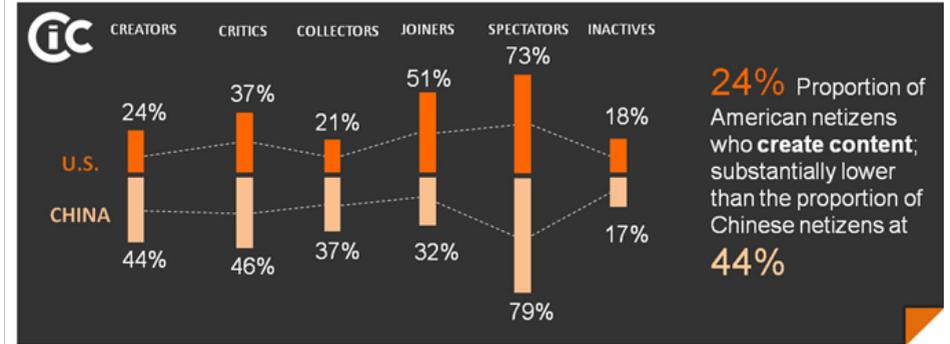
SOCIAL MEDIA PENETRATION TREND



SOCIAL MEDIA HISTORY

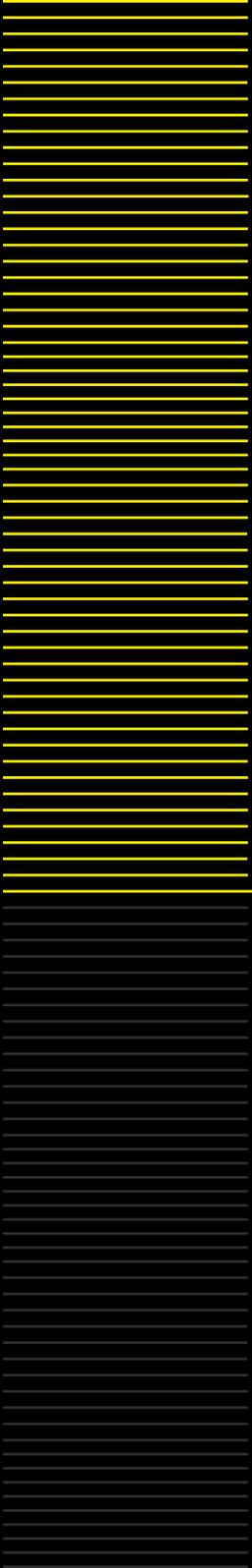


CHINA VS. U.S. NETIZEN BEHAVIOR - SOURCE: FORRESTER RESEARCH



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End of Part 1

Part 2