

# Social Media Research in the New Norm

Moving From Adoption to Integration

**2012  
SERVICE  
EXCELLENCE  
SUMMIT**

**Christie Hickman**

Senior Manager  
Consumer Insights & Strategy

**Heather Hough**

Vice President  
Brains on Fire

# A DAY IN THE INTERNET

# One

# Day



In one day, enough information is consumed by internet traffic to fill **168 MILLION DVDS.**



**294 BILLION** emails are sent.



**2 MILLION BLOG POSTS** are written.



Enough posts to fill Time Magazine for **770 years.**



**172 MILLION** different people visit Facebook.

Twitter: **40 MILLION**  
 LinkedIn: **22 MILLION**  
 Google+: **20 MILLION**  
 Pinterest: **17 MILLION**

**4.7 BILLION MINUTES** are spent on Facebook.



**532 MILLION STATUSES** are updated.

**250 MILLION PHOTOS** are uploaded to Facebook.

If printed, the stack would be as tall as **80 Eiffel Towers.**



**22 MILLION HOURS** of old tv shows and movies are watched on Netflix.

That's how many hours of movies are watched in theatres in 3 days.



**864,000 HOURS OF VIDEO** are uploaded to YouTube.



That's 98 years of non-stop cat videos.



Internet users spend **14.6 MINUTES** viewing porn online.

The average fap session is 12 minutes.

**18.7 MILLION HOURS OF MUSIC** is streamed on Pandora.

If a computer started streaming Pandora in year 1 AD, it'd still be streaming now.



**1288 NEW APPS TO DOWNLOAD**

And more than **35 million** apps are downloaded.



**iPHONE SALES OUTPACE** the human population.



**378,000**  
Number of iPhones Sold



**371,000**  
Number of babies born

Source: "A Visual Look At A Day In The Internet", MBAOnline.com, March 6, 2012

# The New Norm of Digital...

MOBILE SALES  
ON EBAY

\$\$\$\$\$\$

\$600 million  
2009

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\$5 billion  
2011

PERCENTAGE EBAY  
EXPECTS MOBILE  
SALES TO GROW IN  
THE NEXT FEW  
YEARS



MONTHS TO SELL  
THE FIRST  
MILLION PALM  
PILOTS



HOURS TO SELL  
THE FIRST  
MILLION IPHONE  
4S'S



NUMBER OF MOBILE  
APPS AVAILABLE  
IN OCTOBER 2008

8,000

NUMBER OF MOBILE  
APPS AVAILABLE  
TODAY

1 million+

E-BOOKS AS A  
PERCENTAGE OF  
TOTAL TRADE-BOOK  
SALES



0.6%  
2008



18%  
2011

U.S. DIGITAL-MUSIC-  
DOWNLOAD SALES

↓↓↓↓↓

\$500 million  
2005

↓↓↓↓↓  
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↓↓↓↓↓

\$2.2 billion  
2010

Source: "This is Generation Flux: Meet the Pioneers of the New Frontier of Business, Fast Company, January 9, 2012



# ...Drives the New Norm of Data

**1 in 5**

minutes online spent on social networks

**30 billion**

pieces of content shared on Facebook monthly

**\$600**

to buy a disk that can store all of the world's music

Source: McKinsey Big Data, May 2011



# Volatility is the New Constant

**“Uncertainty is when you've defined the variable but don't know its value. Ambiguity is when you're not even sure what the variables are.”**



**Market research is no exception**

Source: “This is Generation Flux: Meet the Pioneers of the New Frontier of Business, Fast Company, January 9, 2012

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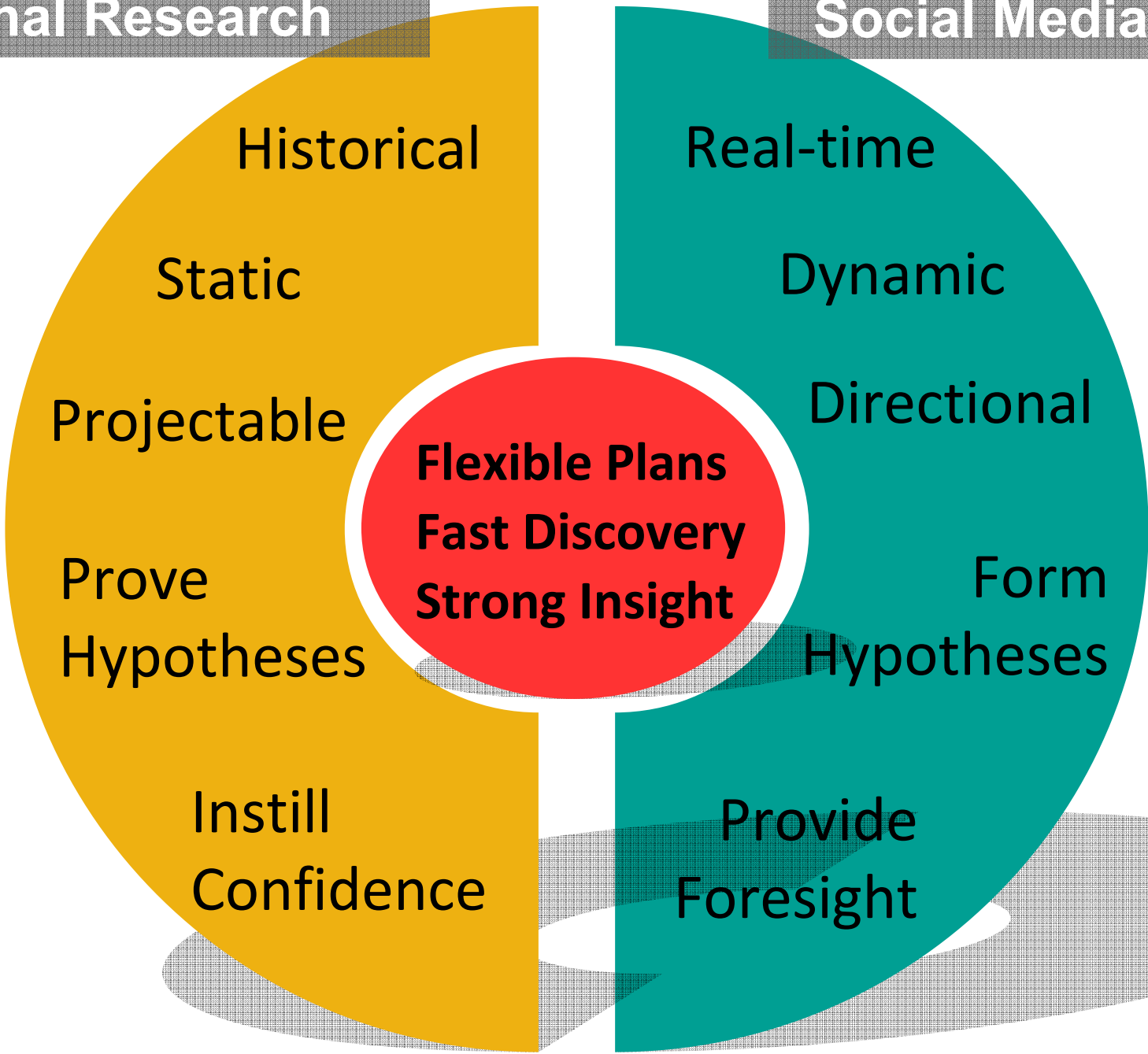
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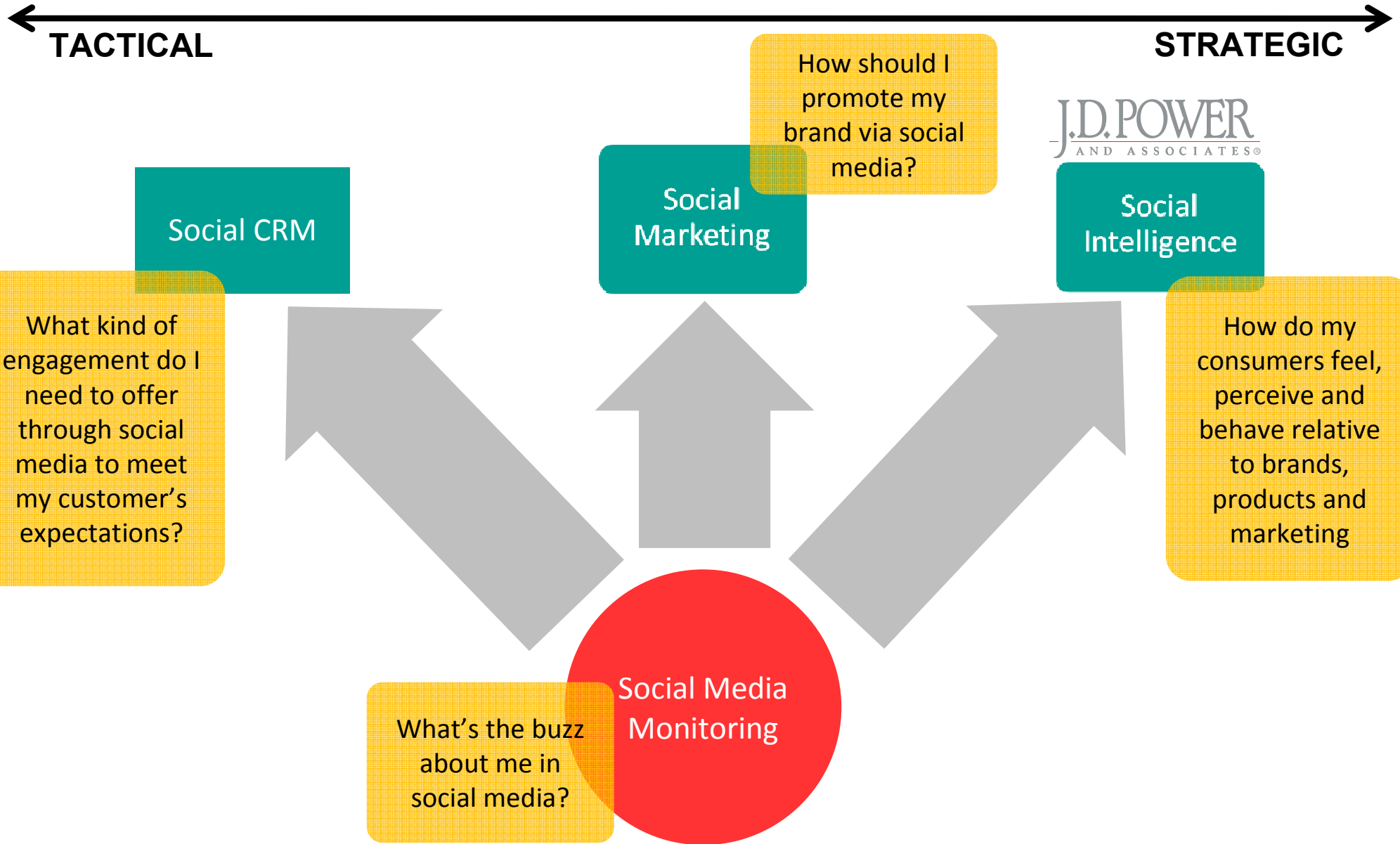


# Traditional Research

# Social Media Research

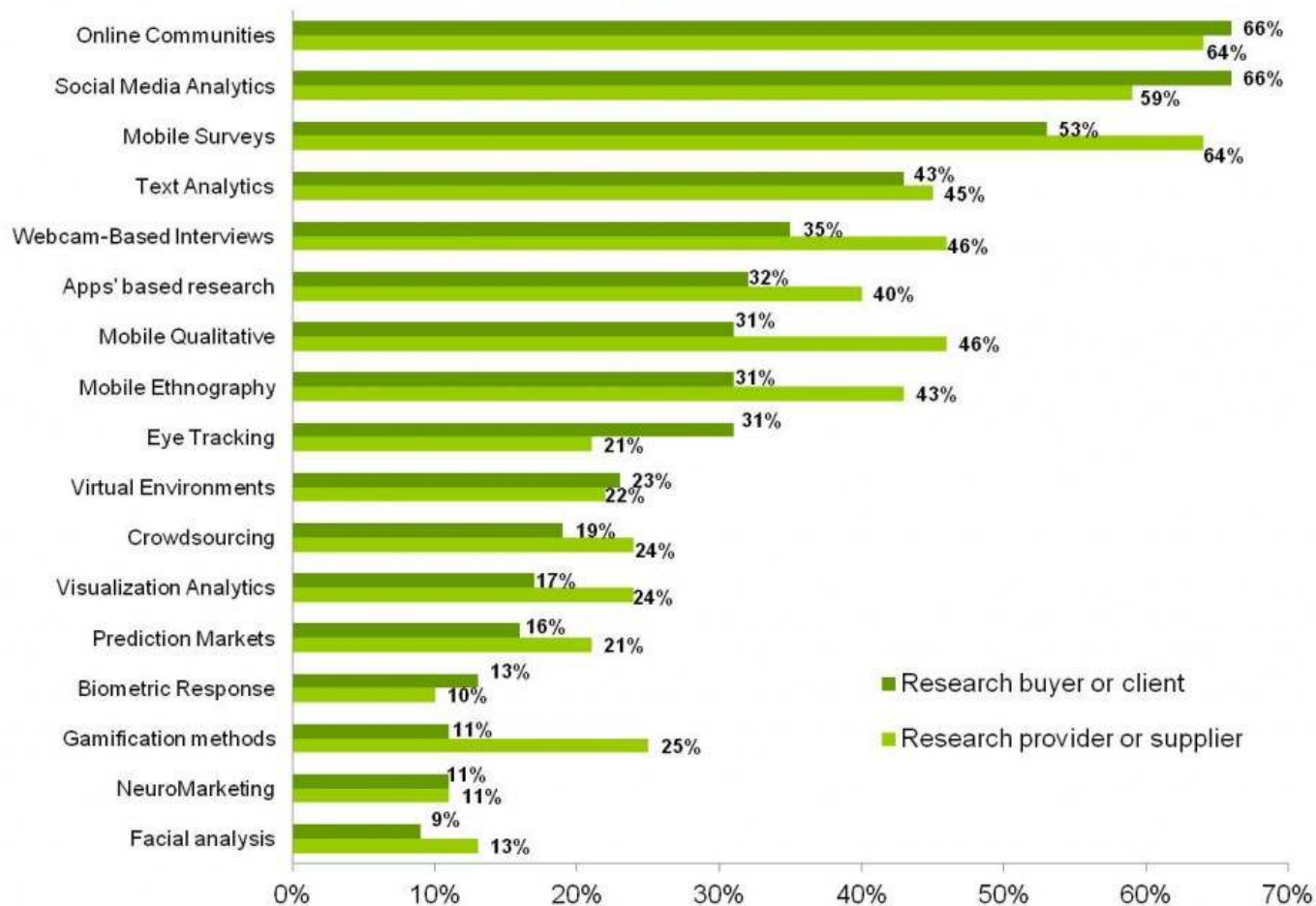


# The Social Media Landscape



# Getting ahead of the pack

## WHAT EMERGING TECHNIQUES WILL BE USED IN 2012?



Up from 29% usage in 2011

Note: Among research buyers (n=149) and research suppliers (n=669).

Source: GRIT: Green Book Emerging Research Tech/Methods, March 2012



How are early adopters integrating?

What are they doing with it?

How are they benefitting?



# Stages of Adoption



## Experimentation

- Conduct pilot projects
- Understand basic metrics and usage
- Compare data
- Make observations
- Develop experience
- Passive

## Application

- Address specific questions
- Explore deeper metrics
- Seek data relationships
- Extract findings
- Expand expertise
- Active

## Integration

- Strategically plan
- Establish proprietary metrics
- Blend data proactively
- Develop insights
- Layered expertise
- Engaged



# Stages of Adoption



## Experimentation

## Application

## Integration

|                  |  |  |  |
|------------------|--|--|--|
| <b>Structure</b> | <ul style="list-style-type: none"> <li>• Volume/sentiment measures</li> <li>• Ad hoc methods</li> <li>• Little acceptance</li> </ul> | <ul style="list-style-type: none"> <li>• Themes and drivers, emotional measures</li> <li>• Loose methods</li> <li>• Gaining acceptance</li> </ul>      | <ul style="list-style-type: none"> <li>• Multi-dimensional measures</li> <li>• Established methods</li> <li>• Accepted widely</li> </ul>                     |
| <b>Tools</b>     | <ul style="list-style-type: none"> <li>• Monitoring tool</li> <li>• Web analytics</li> </ul>   | <ul style="list-style-type: none"> <li>• Custom dashboards</li> <li>• Insight mining/NLP</li> </ul>  | <ul style="list-style-type: none"> <li>• Advanced taxonomy/query tool</li> </ul>   |
| <b>Resources</b> | <ul style="list-style-type: none"> <li>• Dual role or PT staff</li> <li>• Mktg background</li> </ul>                                 | <ul style="list-style-type: none"> <li>• Small, dedicated staff</li> <li>• MR background</li> </ul>  | <ul style="list-style-type: none"> <li>• Hub and spoke consumer insights staff, diverse backgrounds</li> </ul>   |
| <b>Results</b>   | <ul style="list-style-type: none"> <li>• Identify activity</li> <li>• Inform basic SM outreach</li> <li>• Locate threats</li> </ul>  | <ul style="list-style-type: none"> <li>• Deepen marketplace knowledge</li> <li>• Timely, specific reports</li> <li>• Drive tactical efforts</li> </ul> | <ul style="list-style-type: none"> <li>• Improved decision making</li> <li>• Strategic reporting</li> <li>• Stronger insights and recommendations</li> </ul> |



# Expertise that drives integration and insights



*Diverse backgrounds in research, computational linguistics, planning, and marketing*

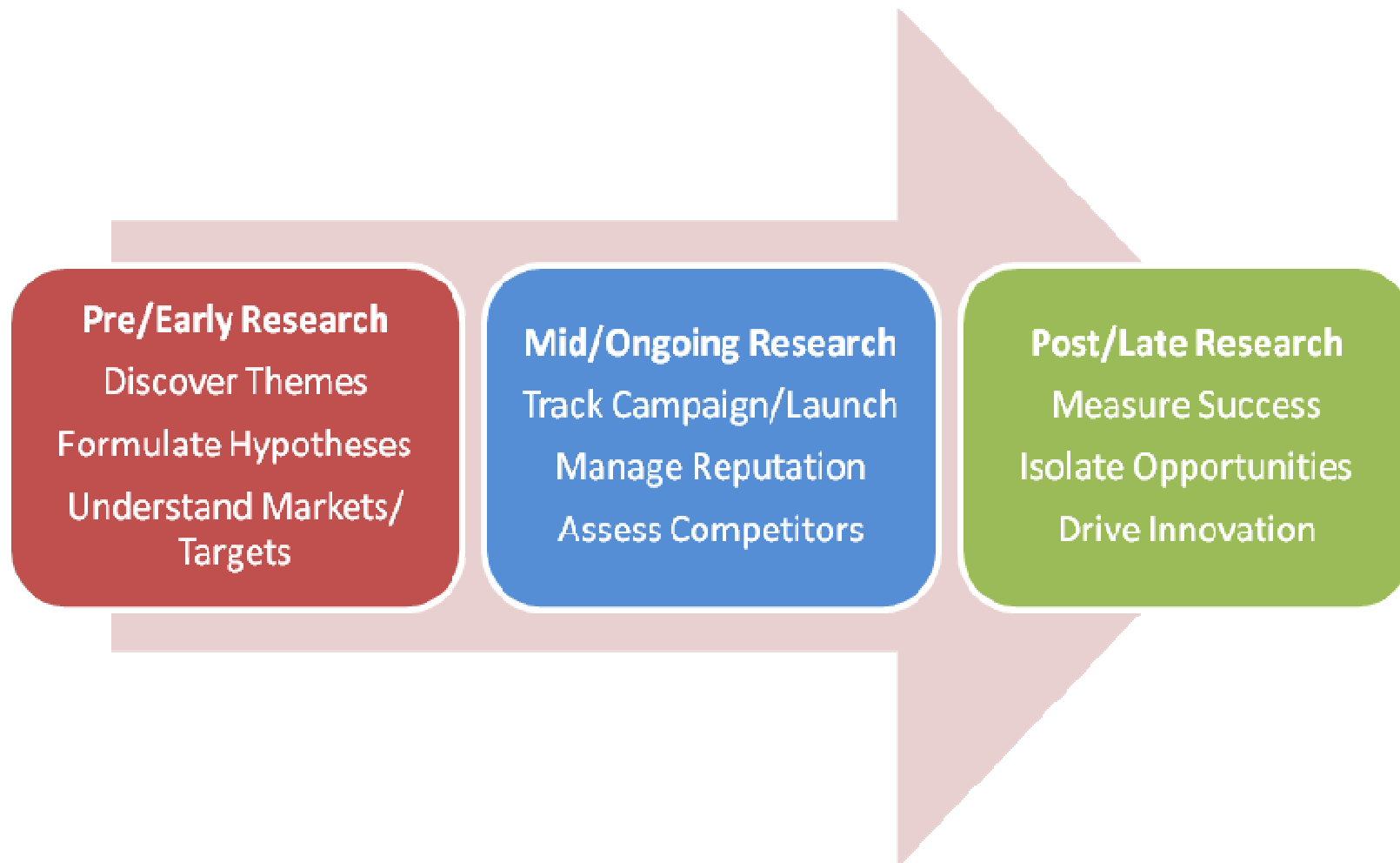
*Well-versed in complex query development and data synthesis, and adept at critical thinking and trend-spotting*

*Industry expertise to deliver focused and relevant recommendations*

*Unbiased approach with the ability to tell stories, illustrate opportunities vs. delivering data and simple findings*



# Enhancements by Research Phase



# Case Study: Early Phase Research

**Social Media  
Research**

**Focus Group  
Research**

**Integrated  
Research**



# Super-Premium Ice Cream | Macro Themes

## TASTE



Consumers crave super-premium ice-cream for its bold flavor offerings—whether it is simple vanilla bean or loaded with goodies

## TEXTURE



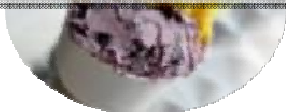
The dense texture of super-premium is noted by consumers that “don’t want to pay for air”

## IMAGE



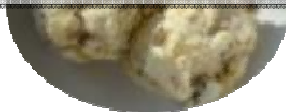
Super-premium brands are perceived as better because they’re “worldly”, “farm fresh”, “all natural”, etc

## EMOTION



Indulging in ice cream is an emotional event that is rewarding but the higher fat content of super-premium brands can trigger remorse

## VALUE



The higher price and smaller size of super-premium brands is problematic for value conscious consumers

# Opportunities & Recommendations

## Category Breakdown



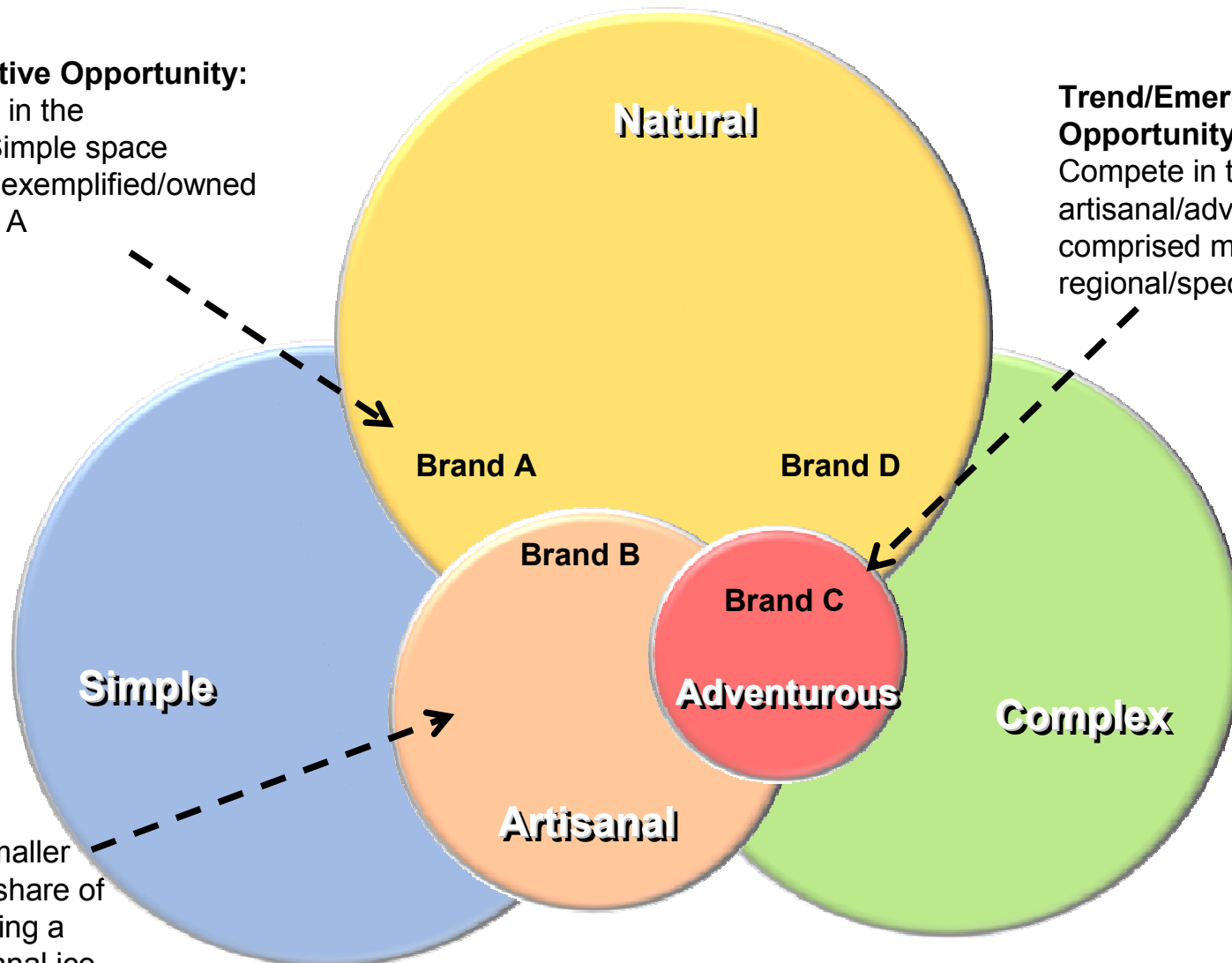
| Category                  | Natural/Simple                           | Natural/ Complex                          | Artisanal                   | Adventurous                   |
|---------------------------|--|---|-----------------------------|-------------------------------|
| <b>Taste: Ingredients</b> | Fewer                                    | More                                      | Varies                      | Varies                        |
| <b>Taste: Flavors</b>     | Simple/Bold                              | Layered/Intense                           | Intense/Fresh               | Unexpected/Fresh              |
| <b>Texture</b>            | Smooth                                   | Varied/Chunky                             | Varies                      | Varies                        |
| <b>Image: Brand</b>       | Sophisticated                            | Fun/Irreverent                            | Approachable,<br>Local feel | Approachable/<br>Lighthearted |
| <b>Image: Packaging</b>   | Austere/Clean                            | Bright/Memorable                          | Personalized                | Personalized                  |
| <b>Emotions</b>           | Indulgent “me time”,<br>special occasion | Reward/celebration,<br>joyous/fun, dig in | Connected,<br>nostalgia     | Adventure,<br>experimentation |
| <b>Value</b>              | Luxury purchase                          | Anytime reward                            | Experience<br>purchase      | Experience<br>purchase        |

# Opportunities & Recommendations

## Primary Categories of Ice Cream as Defined by Online Conversation

**Competitive Opportunity:**  
Compete in the Natural/Simple space currently exemplified/owned by Brand A

**Trend/Emerging Market Opportunity:**  
Compete in the artisanal/adventurous space comprised mostly of regional/specialty brands



**New Market Opportunity:**  
Compete with smaller local brands for share of consumers seeking a simple and artisanal ice cream

*\*Size of sphere represents relative size of discussion based on volume of general and brand-related posts (directional in nature)*

*\*\* Categories defined by themes of consumer conversation, not necessarily specific language used by consumers*

# Case Study: Early Phase Research

## Social Media Research

- Formulated hypotheses
- Drove product concept development
- Identified nascent ideas
- Broadened sample size

## Focus Group Research

- Strengthened hypotheses
- Focused feedback on product concepts
- Tested ideas/ challenged findings
- Deepened qualitative findings

## Integrated Research

- Finalized hypotheses
- Clearly articulated opportunity areas
- Clarified strengths/weaknesses of product concept
- Drove decisions for production phase



# Case Study: Ongoing Research

Weekly Alerting

Launch Management

Campaign Tracking

PIN Data

Ad Measurements

- Manage brand reputation
- Find relationships between social media buzz, ads and sales
- Identify best launch practices

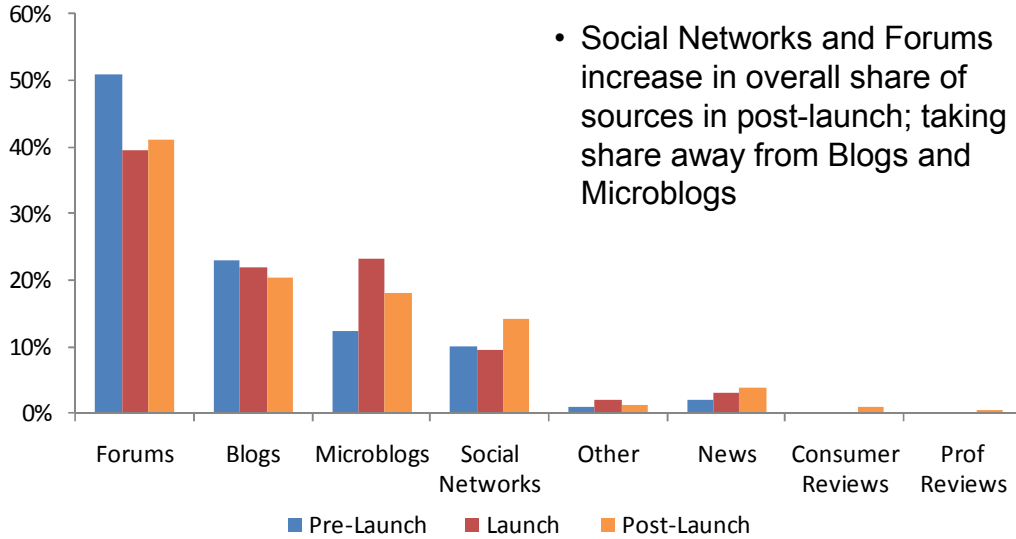


# Post-Launch | Metrics

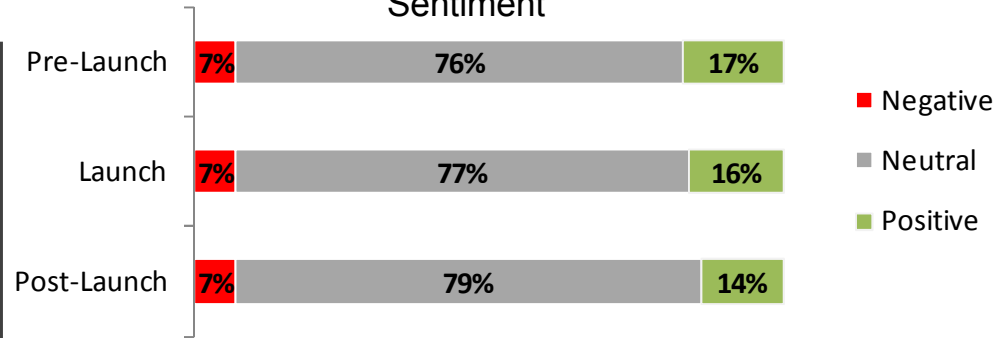
## Metric Overview

### Sources

- Social Networks and Forums increase in overall share of sources in post-launch; taking share away from Blogs and Microblogs



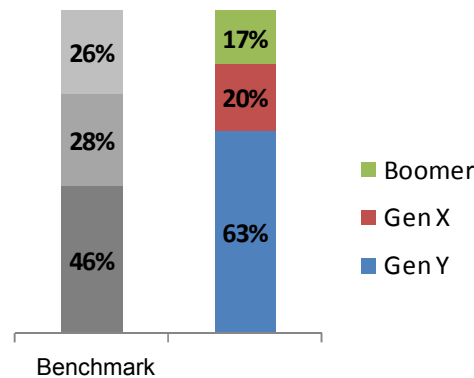
### Sentiment



- Negative sentiment is on-par with the previous launch phases, however, overall sentiment is very neutral as many buzz posts are from professional bloggers with reposts of the Consumer Reports article

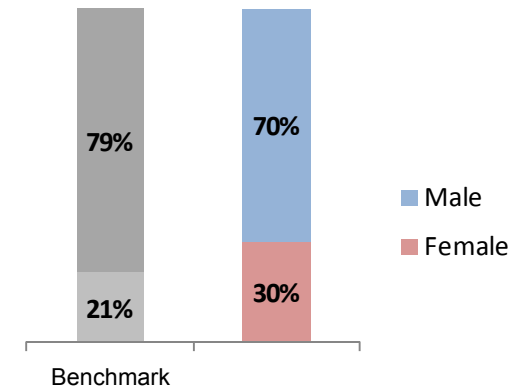
### Age Comparison

- Buzz authors continue to be made up of predominantly Gen Y (down from 69% at pre-launch)
- Gen Y has mixed opinions of the Brand X, many seeing the positive attributes in the other new compact car models recently released



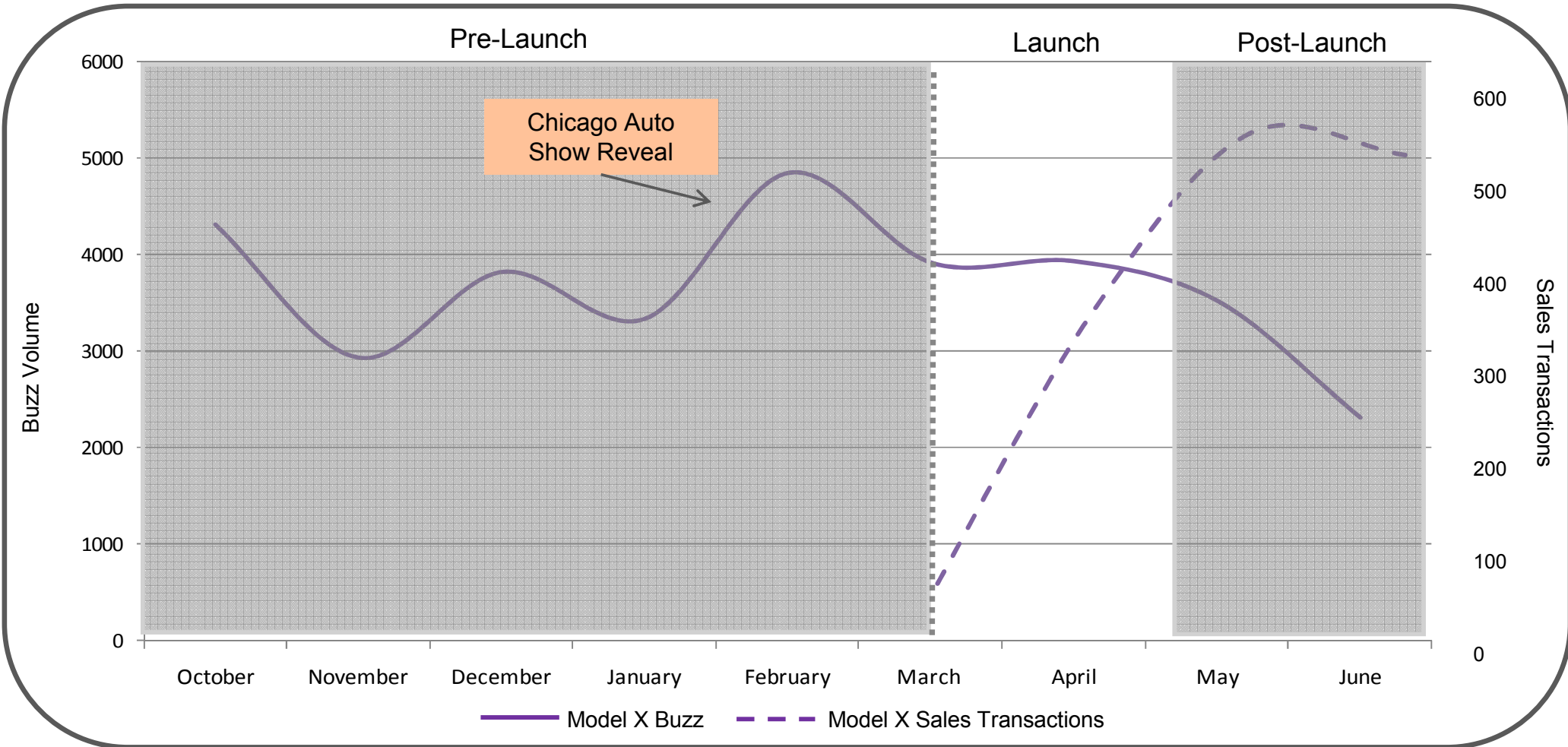
### Gender Comparison

- Females have increased by 9% compared to the benchmark and by 4% compared to pre-launch
- Their posts are general in nature, about buying or using their new Brand X



# Launch | Trended Volume

## Pre-Launch through Post-Launch

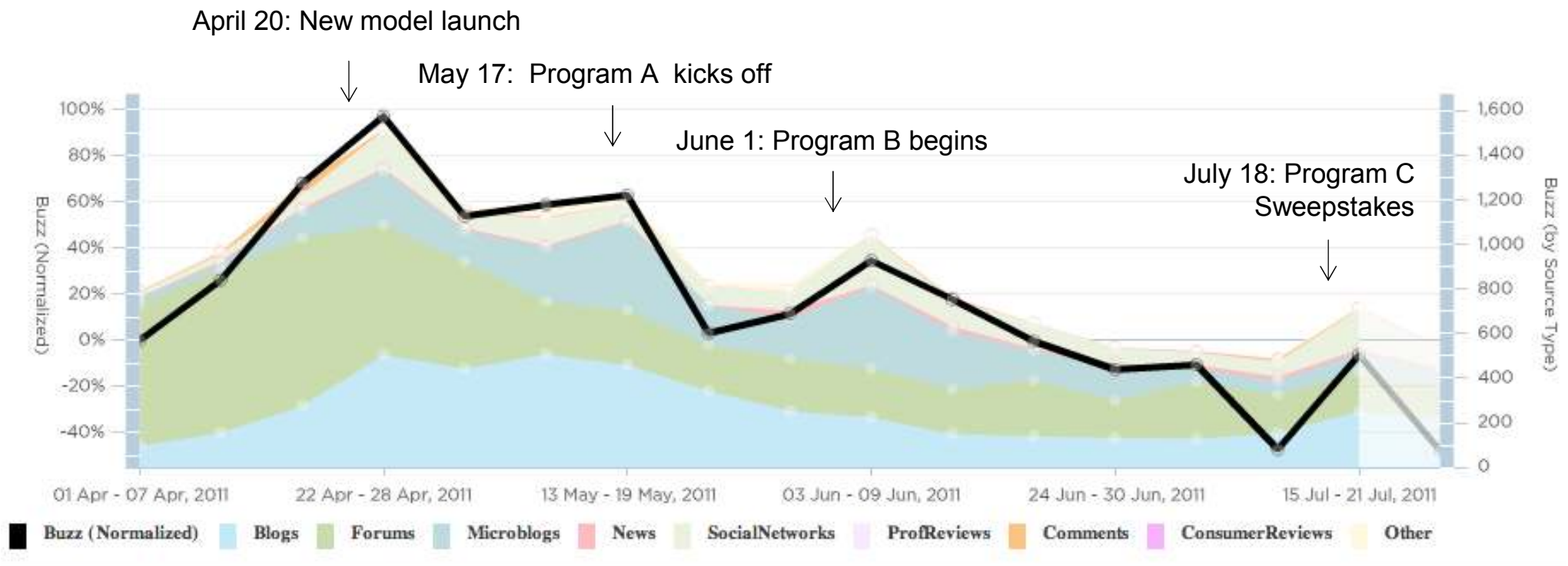


- In the two months following the launch period, volume shows a significant decline as buzz authors lose focus on the topic
- Looking at sales transactions, it starts off slow in March, but quickly increases throughout the next three months

# Launch | Campaign Activity Overlay

## Pre-Launch through Post-Launch

About 15,000 sound bites (April 1, 2011 – July 27, 2011)



# Brains on Fire



# Case Study: Latter Phase Research

**Social Media  
Research**

**Ethnography**

**Integrated  
Research**



# GENERAL FITNESS | FITNESS PERSONAS

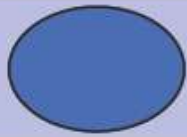
## FIVE CORE GROUPS DRIVING ONLINE DISCUSSION

Fitness conversation leaders identified by volume and clustered by shared attitudes, interests and behaviors.



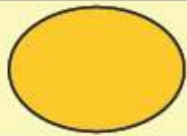
### Gym Regulars

- Driven by the need to workout on a regular basis
- Frequently “check in” on Foursquare or Facebook
- Loyal to the gym and their fitness routine



### Baby Fats

- Frequently yearns for a chance to workout, but never finds the time or energy
- Seek out fitness support and recommendations online
- More likely to consider home-based or family friendly workout options



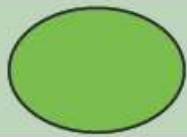
### Scale Watchers

- Gym activity/frequency is determined by increase in weight and/or fit of clothing
- Engage with online friends to stay motivated and focused
- Constantly looking for new ways to stay in shape/get fit



### Social-cisers

- Going to gym is driven by need to socialize as much as the need for fitness
- Dependent on others for motivation or companionship for working out
- Reach out to social media circles to find partner or learn new fitness methods



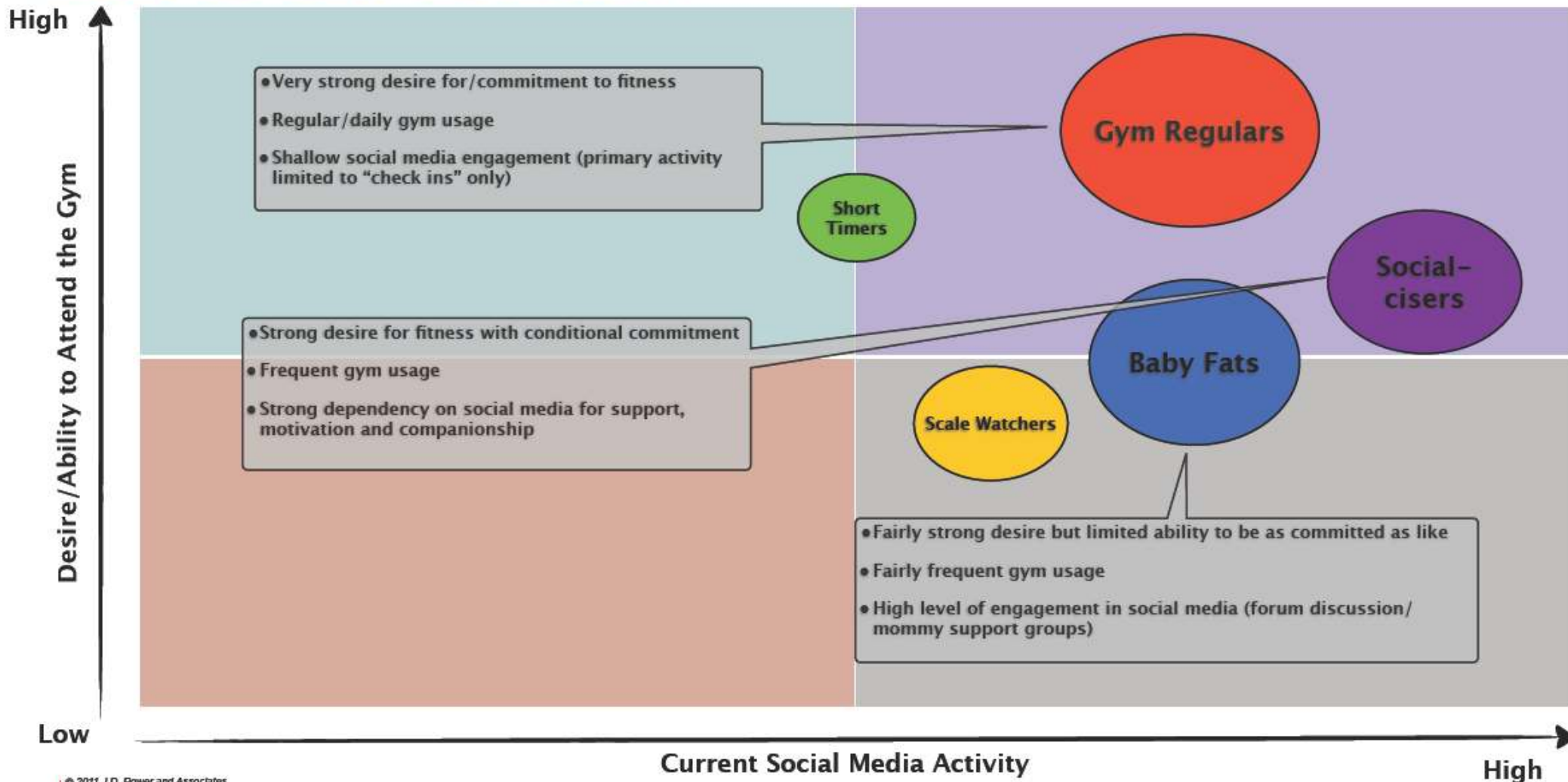
### Short Timers

- Motivated to workout by an upcoming occasion or event
- Social media communication is driven by the seasonality of their goal
- Look for fitness options that best meet their short term goals



# GENERAL FITNESS | TARGET OPPORTUNITY

## THREE KEY SEGMENTS FOR ENGAGEMENT

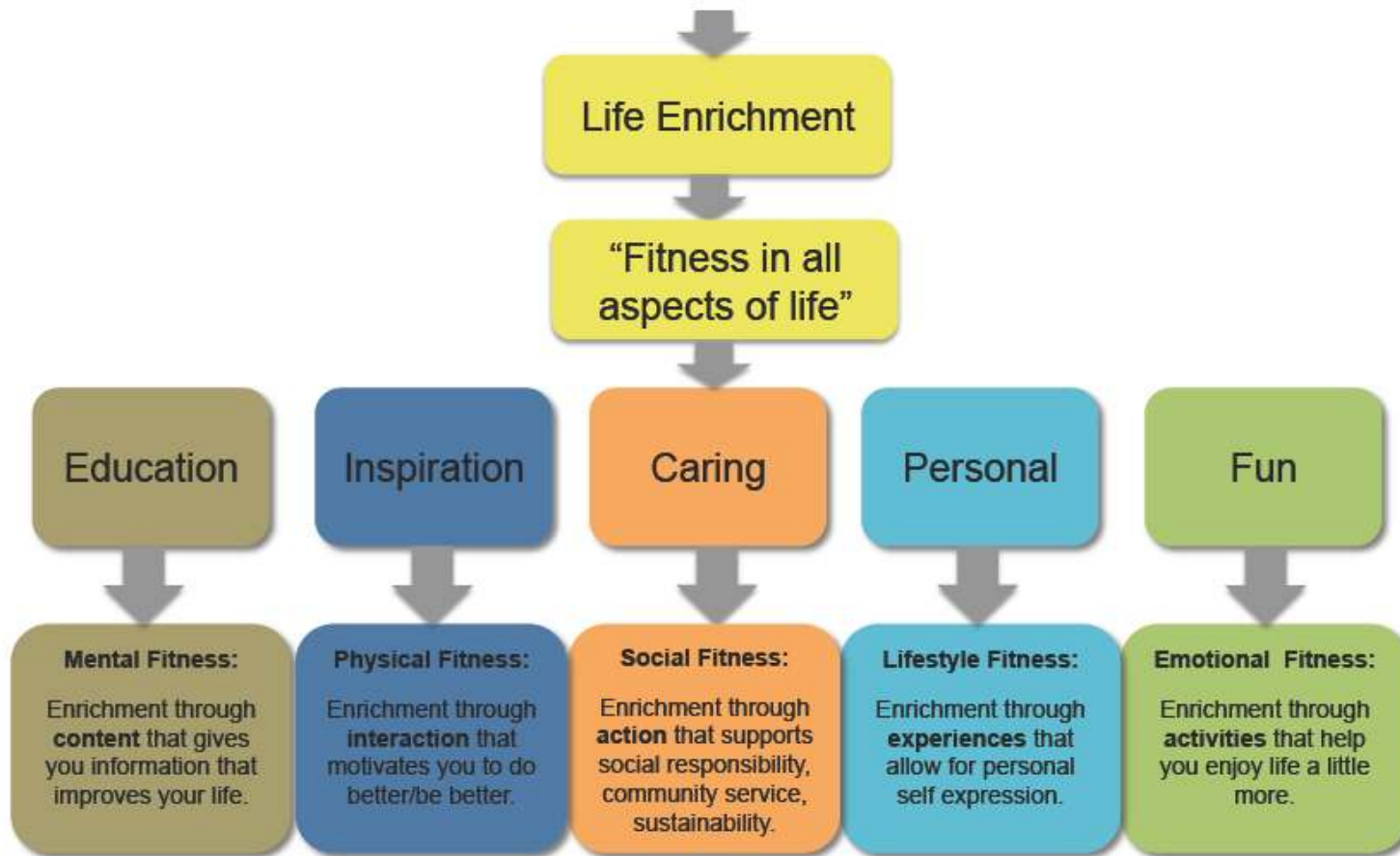


Size of the circle represents the relative size of the segment based on online conversation volume (not actual market size).



# WOM TACTICAL APPROACH | CORE VALUE ALIGNMENT

## LIFE ENRICHING FITNESS OPPORTUNITY AREAS



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# Case Study: Latter Phase Research

## Focus Group Research

- Formulated hypotheses
- Identified category related consumer behavior
- Established framework for strategic and tactical program development

## Social Media Research

- Validated ethnography findings
- Broadened sample size
- Identified category related online behavior
- Augmented strategic and tactical program development

## Integrated Research

- Finalized hypotheses
- Clearly articulated opportunity areas
- Drove overall program structure for WOM initiative



**Experimentation**



**Application**



**Integration**



**Campaign Measurement and Tracking**

**Brand Management**

**Competitive Research**

**Category Research**

**Shopper Knowledge**

**Consumer Segmentation**

**Product Innovation**

# Common Concerns About Social Media Research

- There are too many irrelevant results or spam in the data to be reliable
- Gen Y accounts for the vast majority of social media users, so it's not right representative of the general population
- The types of people posting online don't represent the typical consumer
- Sentiment we've seen has not been accurate
- The data is too broad to be applicable to our specific brand/product/situation

**What questions do you have?**

