



Digital  
Marketing  
Institute

# **SOCIAL RESEARCH**

Transcript

## Social Research

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# **LESSON 1: GAINING INSIGHT WITH SOCIAL RESEARCH**

## DMI 3i Principles

The 3i Principles are the foundation tenets of the Digital Marketing Institute's framework for successful social media marketing. They stand for Initiate, Iterate, Integrate. And by keeping these 3is in mind as you progress through this course when the time comes to develop your own social media marketing strategy you will find it much easier, more accurate and well informed. The core value of the 3DMI 3i methodology is a centrality of the consumer who we optimize towards and seek out wherever they are. Let's take a look at what exactly each of these 3is mean.

Number one, Initiate. Rather than starting with yourself start with the customer towards developing your social media marketing strategy. Your customers are all online, so it's your challenge to meet them there. Every question you may have about them can be answered by the consumer if only we will listen to them. The Initiate principle means that your customer is the starting point and the finishing point for all digital activities. Audience, competitor, cultural and industry research are all vital to see what your customers are doing online and how they are using specific channels. Many digital marketers are too quick to jump into digital and social channels without adequately researching what exactly their customers are in need of. You need to take the time to find out what your customers are doing online before you develop an effective engagement strategy. Conducting online research to inform your online activities will be radically more effective.

Number two, Iterate. One of the greatest strengths of digital is the ability to engage with potential and existing customers online, measure and track responses, tweak accordingly and re-engage or at least learn what did and did not work, so you can tweak your engagement strategy going forward. This forms the second of our 3i Principles, Iterate. Iteration is the process of assessing, amending and creating new versions of a product or process, so that it becomes optimized over a period of time. Based on your learnings from the Initiate phase, edit your creative message, ad type, perhaps even the channels you're using, etc. The most successful digital marketers have a relentless commitment to iterative testing, learning, and scaling.

And, finally, number three, Integrate. This involves integrating all of your digital channels and also your traditional offline marketing activities, so that you can generate enough interest to make customers want to converse and then transact. For example, if you have a TV ad make sure you include the hashtag you're using in your current social media campaigns to encourage online conversations.

## Introduction to Social

People often use the term social media and social to mean the same thing but this is wrong. The most important distinction here to make is that social media refers to the platforms and the applications where people are being social whereas social refers to the interaction between people. A lot of brands think they're being social but in reality they're just posting traditional ads on social media platforms and that is not the same thing at all. If the distinction is still unclear I use three criteria in order to determine whether something is social or not.

Number one is, is what you're posting a two-way or multiple way interaction? If you're just posting to and outwards at someone that's not very social. Number two, is the intent of your post to connect with or build upon relationships? Are you just wanting to give information to people or are you just wanting to push a message? That's not very social either. And number three is the intention to add value to all parties participating. This is the distinction of "Oh yeah, I'm teaching somebody something but only for my benefit." Well, why does this matter? Well because it misses a huge opportunity. If you are just posting traditional ads or promotions on social platforms you are not maximizing the

benefit of social. Social is incredibly powerful because if we do it right we are able to build memories, loyalty and pleasurable associations to our brands through using it. Human beings are wired to connect.

In his 2013 book titled *Social: Why Our Brains Are Wired to Connect* scientist Matthew Lieberman presents proof that social connections are as fundamental to human beings as food and water. In his work, Lieberman discovered that human beings are intrinsically motivated by five fundamental factors, Status, Certainty, Autonomy, Relatedness and Fairness, an acronym he refers to as SCARF. This module will be all about finding out what makes our audience tick and how to reach them through social media. By being social you can apply this to all the modules. Your role as a social media marketer is not to sell a product and it's not to get as many likes and subscribers as possible. Your role as a social media marketer will be to use a social media tools to connect to your audience socially which will result in you selling products as well as getting those subscribers and likes. But your fundamental role aligning to the basic requirements for social is to, number one, encourage and participate in interactions on social media. This means a lot of listening as well as having discussions and posing questions that encourage a participation or a two-way conversation. Which number two will lead to connecting to people and building those relationships. Number three all the while adding value to the parties participating because at the end of the day marketing is all about connecting with your market.

## **Importance of Social Research and Insights**

The value of social research really comes down to one thing. Even though we're going to be looking at competitive and cultural and industry trends-type research it all comes back to knowing your customer. This research will help you become a better social media marketer because it will give you a deeper understanding of your audience and their culture. It will help you create better content for your audience. It will make you wiser and more informed with your budget and spending. It will allow you to create relationships with your target audience growing word of mouth. It will help you identify significant emerging market trends. It will make you able to differentiate from your competition and help you create a Blue Ocean Strategy as well as inform successful social media strategies. What we're looking for in data are insights.

Many marketers mistake facts for insights. Facts are valuable pieces of information but what we're really looking for in all this research are insights. Now many marketers mistake facts for insights. Facts are more the what. Facts can be valuable pieces of information but what we're really looking for is the why. What is happening behind the facts? Why is the insight. It's what is motivating your customer. The fact may be that the average U.S. customer spends 40 minutes on the site but the question is why? What is it about Facebook that makes them want to stick around that long? That is where an insight comes into play. The insight reveals that Facebook is where all of our friends come together on a regular basis and post updates about their lives. FOMO or the 'fear of missing out' drives us to go back time and time again to check up on what people are doing. With this motivation in mind you can plan your strategy to appeal to the desire for the Facebook audience's connection or their FOMO.

In order to further illustrate how an insight can lead to a great strategy I want to cover an award winning and I think it was a pretty big industry-changing campaign. You may have heard of it. It was the Dove Real Beauty campaign. Well, years ago Dove had fallen behind some of their competitors, P&G and L'Oréal. And they didn't have the kind of budgets to really outperform them in ad buying. So they dug deep into the research and found a really incredible insight that customers especially these women that were inundated all the time with beauty products are kind of sick of not being represented in the media. That insight led to the birth of Dove's Real Beauty campaign which

captured the attention of many customers and created a broader movement towards depicting images of real women in the media. Great insights can lead to incredible strategies.

## **Key Components of Social Research**

So then how do we uncover these brilliant insights? That's the more complex part and we'll be diving into that throughout this module.

The research that you do needs to cover all of the dimensions of the market, including your audience. Who are they? What motivates them? What keeps them up at night? Your competition and we're not just talking about direct competitors but anybody that your audience pays attention to. Industry trends, what's happening in your industry but also adjacent industries that you could learn from and understand the changing perception of the consumer market and cultural trends. What's happening in the world that may affect your strategy? How do you tap into local cultural language and ideas and mores? In other words, we're going to cover a complexity of data and stories to explore in your research because you never know where that insight may jump out at you. And now I'm sure you're wondering, "Okay, so you just named up a whole lot of data points to look into. How on earth am I going to cover all of that ground?" Well that's where I apply the snorkel scuba method.

Stay with me here for just a second. So think about doing research like you are exploring a ginormous coral reef, maybe the Great Barrier Reef. And you have to cover a lot of ground in a short amount of time. So metaphorically then put on your snorkel mask and start to skim the surface of all the data. You're swimming over the miles and miles of data and you're looking for that piece of coral or that fish or that special thing that will draw you down and you want to put on your scuba equipment and dive down and explore it. You'll see this in the data all the time. This looks normal. This looks normal. Oh wait a minute. This is anomaly. I'm going to go check it out. For example, I was doing research for an ed-tech company a bunch of years ago and I was looking through an enormous amount of data on how educators use social media and different trends that were coming up in the industry. And at one point I was on Instagram and I saw that a bunch of teachers would use the hashtag, redpen. So I did a search into that hashtag. I dove down into that hashtag redpen and I found that educators really rely on their redpen on a day to day and they actually connect a lot through that redpen as an imagery to late night staying up marking those exams. So I was able to go back to the ed-tech company and say, "We should use the red pen in our imagery." And sure enough it really resonated with the audience.

## **Establishing Brand Capabilities and Goals**

There's one more thing to keep in mind as you approach this research.

Yes, you should be looking for insights in general but you should also be focused on insights that lead you towards your goals. And if you haven't figured out your key progress indicators now is a good time. The two questions that I like to ask is number one, what stage is your company at? And number two, what would you like to achieve with your strategy? When it comes to figuring out your brand capabilities and goals do this in three steps. Number one, figure out what resources you have access to, what talents and budgets you have access to. That will help you figure out what your limitations and your capabilities are. So, for instance, you might love Red Bull's content marketing strategy but if you don't have the access to the kind of budgets or capabilities or talent that they have you might want to steer it in another direction. Don't be a David going up against a Goliath.

You also need to be realistic in setting your KPIs. Everyone wants a viral video of course but the truth is that most viral videos are paper with big budgets, so such KPIs accordingly. And what are those

KPIs? Well in order to help you establish this I've mapped out some sample KPIs aligned to the customer journey. If you're just starting out and nobody has heard of your brand, driving straight to the purchase as well, unrealistic. Your first step is always to build awareness. So number one awareness. If you're relatively unknown, you want to focus on building that awareness. Are people starting to know about your company even if they aren't currently in the market for your product? You want to build followers and engagement as a first step.

Number two is research and consideration. So if people are aware of your brand but are comparing you to alternatives you'll want to know that they're spending a good amount of time with your content and that they're getting their answers to their questions to help them lean in your direction. Time on site, search queries and rankings are good sample KPIs to measure. Number three purchase. Now that you're in the running for consideration you want people to choose you, of course. Your goal here is to make sure people are considering your brand against others and finding out how positively in the running you are. You'll want to know if you're being found, how are you being found and if people are feeling satisfied by what they find.

Number four, experience. If you have sales but are concerned about customer experience there is no better KPI than reviews, mentions and feedback. And number five, retention. And yes people can say they like you but are they buying again? Are they recommending you to friends? These KPIs are in the word of mouth category of recommendations, mentions and public reviews. Don't set multiple KPIs either. Set one core goal that could be measured across all of your efforts. You don't want goals to compete. You need to remain laser-focused.

# **LESSON 2: AUDIENCE RESEARCH AND LISTENING TOOLS**



## Audience Research Overview

If you're taking this course, this is probably not news for you. But just in case, we've moved away from the industrial era or pre-Internet world when the brand was the center of the universe. There was still word of mouth but it didn't have the amplification of the web behind it. So brands could really establish a lot of credibility through advertising and other direct to customer tactics, but then the Internet came along and all of that changed. Though most brands still hold dearly to marketing techniques like advertising, PR, and direct marketing, they are no longer making the same impact.

The web and especially the social web has given customers the tools to spread word of mouth further and faster than ever. In the social era or post-Internet world, one customer voice could have as much of or even more of an impact than your advertising campaigns. The reason it is so important to understand your audience is because, number one, where the brand used to be positioned at the center of the conversation, the audience is now at the center of the conversation. The brand... It's merely part of it. This is what we call an audience-centric world. And number two, researching your audience is incredibly important because we need to understand everything through the lens of the audience, what they love, what they hope for, who they follow, and, of course, what motivates them.

Now, knowing your customer is not about demographics any longer. The social web has given us tools to find out all about the whole human being rather than just their age and gender and ethnicity. This whole person often cuts across demographics. You aren't going to be studying millennials here. You're going to be looking into communities of interest, where you'll find the affinities and passions that bond people together. So, why not demographics? Why don't they matter? Well, they used to be thought of as a good way to categorize people. Men, 18 to 34, all like football, for instance, but it turns out that diversity within that segment is so vast that that sort of imperfect data doesn't lead to really good insights. It's important to get the idea of demographics which are statistical data, like gender and sex and education out of your mind and start instead to think of psychographics.

Psychographics is more interest-based. It's the study of personality, values, opinions, attitudes, interests, and lifestyles. With the social web allowing people who share interest and passions to gather around those interest and passions, there are more and more places online for them to spend time and pay attention. So instead of describing your audience as demographic groups that you're familiar with such as millennial moms or boomer retirees, think of them in terms of gathering around interests or passions. They are a community of interest or a community of practice and may interact or know one another only within that realm. So, how do we do this and what are we looking for? Well, there are multiple dimensions of audience research and we'll be looking at those today. They are attitude and behaviors, needs, wants and goals, life stage, level of understanding, other brands they follow, interests, and motivations.

Another step here to take is to narrow your audience. Now I know that the knee-jerk reaction is, "Buy my product or service is meant for everyone." Well, for one, you probably don't have the budget to reach everyone. And number two, you can't speak to everyone at once. As we just described, everybody has their own interests and passions. So you can either speak to a specific audience whose language you understand, whose motivations you understand, whose passions you're on board with, or you can create generic messages that may or may not hit their mark with anyone. So, now that I'm sure I convinced you to narrow your audience, how do you this? This is the tricky part and it sort of evolves through your research. If you already have an established customer base, well, you're lucky because you have an advantage. Whether they follow you on social media or you have a database full of customers, you can cross-reference their taste, their desires, their comings and

goings, their motivations with all sorts of social intelligence tools which we're going to be covering in this next section. But you still need to narrow this audience.

So, think about your best customers and by best customers I mean those that buy and buy repeatedly, those that love your product and use it all of the time. Those that recommend your product to their network and those that are connected to a dense community of interest which I'll get to right away. Once you've narrowed this audience, use this smaller sample of group as the basis to your research. If you're starting out and you don't really have a customer base, then you're going to need to find a customer within a community of interest who also needs your product or service. And finding a person isn't trivial. You're going to need to access a new series of social intelligence tools, social listening, and other research methods. However, that's what I'm going to define in the next section, which leads me to the concept of density.

So, you're probably wondering what is density and what does it have to do with any of this? Density is the measurement of how concentrated the relationships are within a community of interest. Traditionally, before the web, density was measured on how close people live together in a population. But now with the web, it's how many connections there are between people? How many interests do they share in common? Do they meet offline? That sort of thing. And why do you ask does density even matter? Well, from my experience and research, the best, most qualified leads come from referrals and communities of high density are referral engines. My rule is this. The higher the density relationships within the community, the more things will spread between the members.

My rule is this. The higher the density of relationships within a community, the more messages and ideas will spread between the members of that community online and off. The denser the community, the more connected they are, the more interest they have in common, the more time they spend together online and off, the more they talk and trust one another's recommendations. You'll want to tap into this. It will make your job as a social media marketer so much easier.

So how do you find out how dense a community is? Well, some signals of density are, number one, the number of people and activity within discussion groups. We'll cover discussion groups in the social listening section. But in essence, you'll find people online on tools such as Reddit and Facebook and LinkedIn, having discussions and conversations around their interests. Number two, the number of connections between people within the group. Within each group, the number of people who are connected to each other also creates density. Number three, the interactions and shared interests and passions of that group. So, within a group, if many people within the group share multiple passions, not just the interest of that group, they're more likely to spend more time together and more time discussing. And number four, the presence of offline meetups. So getting to the point where you're going from being in a discussion group or a forum, or just talking on Twitter to meeting up for coffee which always deepens the relationships.

On the flip side, what actually leads to density? Here are some of the factors that lead to density. Uncertainty is the first one. So think about startup founders and other groups where they have a lot of uncertainty ahead of them. They're going to gather to share advice more often. Isolation and marginalization. For example, I've been part of a lot of women in tech groups that really benefit from gathering and sharing tips and tricks as well as helping boost one another within the community. Number three, competition. This one is very obvious, sports team fans who definitely connect and bond over their rivalry with other sports teams. Number four, high passion. The adult coloring book phenomena sprung up over the last many years. And we watched as adult coloring book enthusiasts wanted to talk endlessly about their new-found passion.

Number five, shared experiences. This is where you'll find mummy bloggers who can share their experience in motherhood and feel connected even though they're isolated. Number six, close contact. This is where the original definition of density comes into play, like small town communities who can't help but bond with their neighbors. Number seven, unique identities and taste. So, think about the way you dress, the style on the dress like goths and punks, and anyone who identifies strongly with a style that isn't necessarily mainstream or accepted. Number eight, history. For instance, the Jewish community who have strong historic ties and hardships to share over the years. Number nine, time to kill. This refers to teenagers and others who may seek out communities to spend free time and meet new people. As the factors above increase, the density increases. There's a point where group size also hurts density. For example, when towns become cities, community density dissipates. So small- to mid-size communities are the best to focus on.

And now, how do you qualify your audience? Number one, how dense is this community of interest? Now keep in mind also that lack of density doesn't necessarily mean that you should disqualify them. It actually could create an opportunity. Tim O'Reilly, the founder of O'Reilly Media, the company behind some of the most best-selling developer resource books and conferences once told me, "If you see a parade, get in front of it." That is if you see an emerging community that requires leadership and cohesion, and you can add that value. It can be incredibly powerful. Number two, are the members of this community in need of what you're offering? This is a very fundamental question to ask yourself. If you see a fantastic, dense community, however, they're not in need of your product or service, you should probably not make them your core community of interest. And number three, do you have a connection or experience with this community? You can definitely grow connections from scratch but if you already share a passion or connections through a community, all the better.

A good exercise to do now is to put everything you're thinking about into the following statement. My audience is (narrow audience) who needs specific needs (that I can help with). I'm particularly qualified to serve this group because, (social proof). I'll give you a personal example. When I was trying to come up with the same statement for my web series, this is what I came up with. Truly Social is a video series created for frustrated social media marketers who are trying to sell concepts to their bosses and/or clients. And I'm particularly qualified to create this series because I have over 16 years of social media marketing experience dealing with those same bosses and clients. This means that, of course, there are certain people that my series isn't meant for. But for those who are in that group of frustrated social media marketers, I get all sorts of emails every week saying thank you so much for answering that specific frustration that I have. And my channel has grown like wildfire because of it.

## **Audience Research Tools**

So let's start with social media analytics which presumes you already have an audience to analyze. If you don't, keep this in your back pocket for when you do. Let's start with the free social media tools that are out there on platforms like Twitter and YouTube, Facebook, and LinkedIn. Twitter has some of the most fascinating and robust analytics around. They use their own data, cross-reference with data from a variety of partners. First, and many people don't actually know this, these analytics are available to everyone, whether you have a brand or just are a casual tweeter. This will open your analytics home in a new tab or window.

There, you will see a 28-day summary and highlights of your most popular tweets, mentions, number of new followers, profile views, etc. What we're really interested right now is the tab at the top of the page called audiences. In the image on the right, you can see the audiences tab which defaults to an overview and provides a lot of excellent data about your audience, their interests.

On to YouTube next. YouTube's analytics are pretty extensive but more focused on content performance than on getting to know your audience which is too bad. To access them, go to your Creator Studio by, once again, clicking on your profile image in the top right corner and choosing Creator Studio. Then click on analytics on the left hand column to expand the options and then demographics.

As I said earlier, demographics aren't really very useful in my opinion. However, I can take note of the fact that my audience seems to follow similar patterns to my Twitter followers. So I can probably assume that many of my Twitter followers are also subscribed to me on YouTube, and that the audience crosses over quite a bit.

Now for Facebook, it drives me kind of crazy that Facebook offers more insights to brand pages than they do personal profiles as I do a lot of my personal profile, but moving on. When you're on your page, click on the insights tab at the top of the page, below the search bar. Then click on the people menu along the left hand side to open up your demographics insights. Much like YouTube, there isn't much more here than the demographics, information like age and country and gender.

Now for LinkedIn. Different analytics are provided depending on the type of page you have, whether it is a personal profile, a company page, or a group. If you are personally connected to a lot of people on LinkedIn, you should get a lot of interesting data from just your personal profile. You can actually start to scroll down this page and see the individuals who've looked at your profile which can be an interesting exercise in, "Huh, I wonder why that person looked at my profile." Or you can look at the statistics in the overview at the top which will show you the titles and industries of the general people that have looked at your profile.

If you have a business page, just click on the analytics tab below the company name and logo bar. If you scroll down, you'll be able to get similar demographics for your page followers. Understanding the industry that your audience is in, their seniority and job title can give you a great jumping off point for digging deeper.

So now onto Google Analytics. If your website gets a good amount of traffic, Google Analytics will offer up some data on the interest of your audience. You can start to click into those categories as well to find out deeper behaviors like how much time they spend on your site and if you have your Google Analytics set up right, whether or not they convert. This may help you understand who those valuable customers are and what they want.

## **Social Intelligence Tools**

Let's move on to social intelligence tools. These can be used by anyone, whether you're just starting out or you have a well-established business. Social intelligence tools drive consumer and business insights from what people are talking about on social media channels. They allow you to be proactive and entirely customer-centric. Unlike social media monitoring, which focuses on people talking about your brand or about a specific brand, social intelligence tools cover what people are interested in, in general.

Let's now look at klear.com. You'll have to sign in with your Twitter ID, but it offers some pretty powerful data for free. Just go to [klear.com/signup](https://klear.com/signup) and click Sign Up With Twitter. On the Influencers page, you can search for just about any skill in any location.

Klear offers up some sample scales and locations. So, for example, football, golf, and tennis in sports, or actors, illustrators, writers in art. You can filter by influence, friends, and celebrities who have

verified accounts or a lot of followers, power users, people that are in the top 10% of Twitter users, casual, people who are considered fairly engaged, but probably don't have a lot of users, and novice, people who are pretty light users.

You can also expand or switch locations and also filter by gender or people versus brands. Here are the results when filtered for people who are also power users. From here, you can follow them on Twitter, look deeper into their analytics to see what kind of content they're sharing, who they talk with, and what their audience looks like.

This is a very useful tool to start with before you do anything else. It helps for creating social listening as well as for starting with the other tools we're going to be talking about, like Affinio, when we don't already have an audience.

Affinio is an excellent, but expensive tool for audience research. It really is worth every penny, so, if you're part of an organization that has a budget for analytical tools, this is a good one to invest in. Here's the main page for a report on my Twitter handle @missrogue. When Affinio first runs the report, it pulls in all of the followers and splits them out into tribes, which is their word for communities of interest, as in Tribe 1, Tribe 2, Tribe 3, and so on.

You have to name these tribes based on the kind of data that you see attached to them. So, for example, the tribes that follow me or the communities of interest, are represented in this diagram with all of the dots that are connected to one another in different coloring groups.

When I first ran this report, they were unnamed, but by going through the next few slides that I'm going to show you, I was able to give them identifiers, like Tech Geeks, and Startups, and Lifestyle Bloggers. Your tribes, or communities of interest, relate directly back to understanding your audience so that you can understand them and build a rapport with them. For example, if you choose the Startups tribe from the menu on the left and select the Overview tab on the top of the page, you'll see that within the bio keywords of this tribe, the Twitter users put things like entrepreneur, tech, founder, cofounder, startups, etc.

The images on the right are the profile pictures of the accounts that this tribe follows on social media. If you scroll over them, you can see who they are and what their follower counts are. Hashtags they use are #startup, #startups, #entrepreneurs, #fintech, etc. They follow venture capital firms, TechCrunch, other startup founders, and other accounts that talk about startups and entrepreneurs.

All this data culminated to say to me, "This is the startup tribe." When I go into the Interest tabs, I see the breakdown of what they're interested in. The left-hand column in gray shows the categories of the accounts that this tribe follows. Under Brands or types of companies that they follow, I see VCs, angel organizations, startup accelerators, and other startups.

When I click Entertainment, I see that they enjoy TED Talks, South by Southwest, O'Reilly Media, Freakonomics, and other resources that are frequently followed by entrepreneurs. The only mainstream reference that I see in this list is The Daily Show with Trevor Noah.

Their celebrities are all venture capital firms and startup founders, not the typical type of celebrity. A celebrity that we think of is an individual who's well known and quite often an entertainer. Think Beyoncé or Jennifer Lawrence. But in the case of startups, celebrities are high profile VCs and entrepreneurs.

By isolating these tribes, I can identify unique interests and affinities within each of them. This helps in identifying which tribe this is and what I should name them. If we go back to the Overview tab, you can see a few other data points that help me connect back to the idea of density. These charts here show me how interconnected and similar the members of these tribes are.

My Australian followers here, which are a pretty small tribe, are far denser than the other tribes. This means that they follow and talk amongst one another more often. They also have a pretty good number of shared interests, so by listening to them for a period of time, I'll be able to get all sorts of ideas on how to talk to them and reach them.

But, what if you don't have many Twitter followers? Then, how do you use this tool? Well, number one, you can look into someone else's followers. So, say you go back to klear.com and find one of those influencers in the area that you are looking to reach, or you can use hashtags that you know are commonly discussed amongst your community of interest.

To do this, just click Menu, select a New Report. Then, choose a social media network that you think the audience is most likely to be on. In this case, we're using Twitter. Click Tweet Content to build a custom audience based on what people are tweeting about. Then, you can use a Boolean search to create the parameters around that discussion.

A Boolean search is a type of search that allows users to combine keywords and operators such as and, not, or, to further produce more search results. For example, a Boolean search could be football and the United Kingdom. This would limit the search results to be conversations that only limit those two keywords, United Kingdom and football.

Or you can use a Boolean search, football and soccer, to expand your search to include results from both football and soccer. Here, you can see the search results discover people who were using the #cndhealth, or #cdnhealth, or #healthpoli because I was interested in finding out more about doctors in Canada, and I knew from my results in klear.com around influencers in health in Canada, that they use these three hashtags.

Here are the insights gathered from that search. The results show that there is greater density amongst people using hashtags than following any particular user. You can also see that the Care Not Cuts conversation, which are based on a group of health professionals in Canada lobbying being the government to stop cutting funding to healthcare, are extremely dense.

This is because, well, they meet some of those drivers of density: uncertainty, high passion, shared experiences, and unique identities. The results also show that group members are extremely likely to respond to articles about the cuts that support their position.

You could really use this to connect with this audience and build rapport. When you dive into the Content section found in the Overview tab of the Care Not Cuts conversation tribe, you see that the posts that this group shares and engages with most are the ones that support their position. Affinio gives you access to all sorts of data that you can pull from the public conversation.

This is truly next level of social data, but we still have a few tools in our toolkit to go over. There are even more ways that you can round out your audience research. The first of these is through surveys. There are many ways that you can conduct and structure a survey, but for the purposes of our research, we're going to keep it as simple as possible. The three things to keep in mind when doing surveys are, number one, sampling.



Make sure you're asking enough of the right people. This means that you should not be asking friends or colleagues, unless they're in your target audience. You should seek out those in your community of interest who are potential customers to take surveys. Number two, structure. Make sure that you're asking the right questions and being precise on what you're trying to find out from the audience.

You don't want to ask leading questions, but you do want to structure your questions in order to get insightful answers. Two types of questions can be used here: closed-ended and open-ended. Use a close-ended when there's a limited number of choices to make, such as a sliding scale or a choice of known options. And use the open-ended when you want more general feedback and the range of potential answers is broad and unlimited.

And number three, scale. Comparing apples to apples, can you look at a large amount of data and come to the kind of conclusions you need to in order to get answers? The number of surveys you need to gather to feel confident about your results depends on the size of your potential audience. There are a few terms you'll need to understand in order to calculate the number of surveys you'll need to collect.

Population size. This is the total number of people in your potential target market. Margin of error. This is the percentage that describes how close the answers your sample gives are to the answers the overall population will give. Confidence level. This is how confident you will be about the margin of error. You've seen polls that say, "We are confident within a 4% margin of error." That means that if you ask everyone in your potential audience a question, their answer could fall either 4% higher or lower than the answer given by your sample. As an example, say you need to gather information on the operating system your audience prefers. By your estimates, there are 400,000 potential customers in your target market. If you decide that the industry standard of 3% margin of error at 95% confidence level is appropriate, then you will need to get 1,065 completed surveys.

SurveyMonkey has a convenient and free calculator for you to be able to calculate your sample size. There are quite a few survey tools that you can use to host your surveys. A few of these are SurveyMonkey, Google Forms, and Wufoo Forms. The catch with these platforms is that you have to find a way to distribute the surveys to enough people in your audience.

This is great if you already have a significant following or a mailing list. It's totally doable but you'll have to hustle to get the survey out to as many people as possible, and also maybe serve up some qualifying questions. If you don't have access to a large group of people in your audience, you might want to try some of the survey panel services.

They vary in expense, but they could really be worth your while. They can also turn out to be really great brand-building exercises as well. Some of the options out there are Snap Surveys, Google Consumer Surveys, and YouGov. There are lots of companies out there with varying degrees of good panels. Google leverages contextual targeting, offering up surveys after a few pre-qualifying questions.

Snap Surveys has millions of potential panelists worldwide that you can target through behavioral characteristics and/or demographic information. YouGov was one of the early movers in the space and uses active sampling, which means their panelists are pre-qualified through a series of precise, sociodemographic and geographic information.

They also weight their data with offline resources.

## Audience Listening Tools

Now, it isn't enough to have data from just one snapshot in time. Even tools like Affinio only give you hashtags and content insights from a short, recent period. If you really want to get to know the audience, you will have to engage in active listening over a period of time.

It's important to note here that you're not listening for mentions of your brand or company by the audience either. What you're looking for is what matters to them in order to facilitate more personalized engagement.

Finding relevant hashtags is another way of discovering new people in conversations. Earlier, we saw the example of pulling in the audience through hashtags using a community of interest. When it comes to social listening, you should also be following hashtags to see emerging conversations. There are a few ways to find hashtags on Twitter. Number one, in Klear and Affinio, you start to create a list of influencers. If you follow your list of influencers and participants in a community, you will start to recognize hashtags used on a regular basis.

The example of the 'cdnhealth' hashtag I used earlier to find more people in conversations on Affinio came from following a list of influential doctors in Canada. I saw that they were using the hashtags #cdnhealth and #cndhealth as well as #healthpoli in various conversations. So I took note of them and used them in Affinio search to find more about the broader audience talking about health in Canada.

Number two, if you haven't come across hashtags that influencers and your audience are using, you can go to RiteTag and search for hashtags around a subject matter. They have a simple search on their home page that allows you to enter a topic and search for potential hashtags used to discuss that topic. And number three, another tool to search for potential hashtags is Keyhole. A quick search found on their home page will give you a snapshot of hashtags. On Instagram, though, there are tools you can use to find popular hashtags, the most effective way to research hashtags is through the native Instagram mobile application. It not only shows you the results for general hashtags, but it also suggests all sorts of other hashtags you should look into. When I was researching teachers on Instagram, the automatic suggestions on the tag search results page gave me all sorts of ideas on what to look for. That's how I found redpen.

Another great source for social listening is discussion groups. Discussion groups are usually present when a community has great density. Discussion groups exist on many social platforms and can be a great way to discover the challenges and culture of a community. Here are a few examples, LinkedIn groups, and sub-Reddits. Now, if you don't know Reddit, it's a huge group of discussion boards online. Within the board, there are hundreds of thousands of conversations around specific topics and these are what are called sub-Reddits. Within those sub-Reddits, you will find very enthusiastic, passionate members of communities of interest. There are sub-Reddits for pretty much every topic that you can imagine. There are sub-Reddits for people who modify tractors, people who are enthusiastic about collecting insects, birders, accountants, documentarians, you name it. Once you find your community of interest, you can most likely go on to Reddit and search for a sub-Reddit and find them talking there. Another example is Facebook groups and Google groups.

Now, Google groups were very much like Facebook and LinkedIn groups although they usually communicate through email threads. Much like sub-Reddits or LinkedIn groups or Facebook groups, you can find a Google group on pretty much any topic. When you join these groups, make sure you turn on your notifications as you can't really plug these into any other social listening platforms that I'm going to cover. By following them on a regular basis, you can find out what they're the most



passionate about so that you can facilitate more personal conversations down the line. The last step is to make sure you're covering up as many networks as possible when following your influencers and participants. They may be sharing things on various platforms that they aren't sharing on Twitter. Are they on Medium, Instagram, Facebook, Snapchat, Periscope, Pinterest, YouTube, LinkedIn, Tumblr, and do they have a blog?

To find the most people, use similar usernames across most networks. But if not, you can use a search to try to locate them within the directory on each platform. Once again, it is important to try to find influencers on all of the platforms that they're on because, like I said, they may be sharing things on one platform that they're not sharing on another. It also helps you understand the whole person, the personal, the professional, the interests. Now comes time to enter everything into monitoring tools to help you easily follow along and track multiple users and conversations within your communities.

A social media monitoring tool assists you in following many people at the same time more easily. There are many of these tools available, and really it's all based on your own preference. But here are a few that you can look into; Hootsuite, Tint, Tagboard and Mention. Setting this up isn't just good for your initial research either. When it comes to social, audiences shift over time, so keeping track of the audience discussion on these tools will help you to update your understanding along the way.

You will need to make social listening an ongoing part of your role, not just use it for this section. Here are some screenshots of Hootsuite. In order to track across more than three social networks, you'll need to upgrade to the paid pro version. You can use the Hootsuite's streams tab to monitor different networks or communities. There are a bunch of ways to set up your social listening in Hootsuite. But to start, you need to add social stream. So click on the plus, add stream button at the top of the page. A pop-up will appear asking you to either connect to various networks or choose a stream from one of your networks to add. You can add the list you have created or create a stream for a hashtag that you want to follow. There are also several apps within Hootsuite that allow you to add extra analysis on the discussions, helping you see who are the most influential people which hashtags are emerging, shifting word clouds etc. Tint makes a really lovely social listening dashboard, starting around 500 a month. Nasdaq even uses Tint as their big social listening dashboard. You can create dashboards across multiple networks based on hashtags, users, groups, lists, and more depending on the network.

Tagboard is incredibly simple to set up but you can only follow one stream at a time, and if you want to set up a permanent tag board to track, you'll have to pay. To set it up, just go to tagboard.com and type in a hashtag into the search box. The result will be a real time stream of all of the social media from across various platforms that use that hashtag. The advantage of Tagboard is that, after you create a tag board, you can share it with your entire team so that everyone can follow along and get to know the audience better.

So I know this may sound crazy and like a lot of work, but I'm a fan of doing the monitoring natively. This means following everyone that I can and immersing myself in the conversation for a few weeks. Most people will say this is unrealistic but really it is the best way to understand what's going on and get a full picture of the members of the community. I also find that it brings up some really great real-time opportunities for connection. Social networks are not really about business; they're more about being social. So listing in real time allows you to get into your social groove. It gives you greater insights into the people that you're following and also creates opportunities for social connection in real time.

So if, say there's a community member in the list looking for a great restaurant in a city that you know really well and you know some great restaurants, you can jump in at that time creating a connection with that user by offering up your suggestions. The more helpful you are, the more that you'll build rapport that will really come and useful over time.

## **Audience Research Dimensions**

Now on to the audience research dimensions. The first dimension that we're going to be looking into is the attitudes and behaviors of people within the community. Full definition, an attitude is a set of emotions, beliefs, and experience that the audience brings with them to a particular object, person, thing or event. Examples of attitudes are, "I get stressed out over holidays," or "I'm afraid of spiders." Attitudes are usually the results of past experiences, lack of past experiences, or outside influence. And attitudes determine behavior.

Behavior is the way that somebody acts towards something because of their attitude. Examples of behaviors affected by the attitudes are, "I eat more and drink more during the holidays to reduce my stress," and "I run and scream when I see a spider." Attitudes and behaviors change but only when there's intrinsic motivation to change them. Now on to needs, wants, goals. A need is basic. It's what people believe they require like food, and shelter, and water, and that sort of thing. A want is more of a luxury. I may need food but what I want is to eat at a local farm-to-table restaurant. And a goal is something which someone has in their life. So I may need shelter but I set a goal to buying a nice house in a nice neighborhood. Different cultures have different definitions of what needs, wants, and goals are. For example, I'm a Canadian, and most Canadians would say that free public health care is a need whereas our American cousins to the south would probably mostly say it's a want. You need to be careful with value judgment. Needs, wants, and goals are not universal. It's important to understand the needs, wants, and goals of a particular culture in order to help you determine your messaging for that audience. If you can appeal to a need, want, or goal, you will capture the attention of that potential customer.

Here is a pretty good example of a different culture seeing different needs. A popular theory of needs is by Abraham Maslow. It's known as Maslow's Hierarchy of Needs. This theory demonstrates that certain needs are more fundamental than others and once those needs have been taken care of, people will work their way up the pyramid. So if you're hungry for instance, self-actualization is pretty far beyond your immediate goals. In different cultures, there are different needs that are defined. This internet meme went around in 2013. Once again, understanding that these needs, wants, and goals are relative to your specific audience will help you frame your proposition when approaching them. And as to know back to Lieberman social, We Are Wired to Connect, it is now thought that belonging and love is more fundamental than even the physiological or at least on par.

Apart from understanding that different communities have different needs, we should also be on the lookout for the goals and the wants related to your brand. This does not mean that you're scanning for opportunities to jump in and pitch someone though. What it does mean is that you're learning from this and how to create content in messaging in a language that speaks to those wants and goals.

Now on to levels of understanding. Understanding where your audience lies in the spectrum of knowledge about your product. Offering a brand is extremely important. If they are experts in the area, you'll lose them with the 101 messages. If they're beginners, you don't want to go over their heads. So when it comes to knowledge in the area of your industry, ask, is your desired audience, A, a novice or beginner? This means having zero to little knowledge. If so, you'll need to stick to the basics. B, do they have a basic understanding? This means a little bit of knowledge, so don't start

with the 101s but also don't get too technical. C, advanced knowledge. This means don't waste your time with the basics, start to get technical. Or a D, are they experts? You'll need to speak to this audience through their peers and not the popular ones. D, are they expert? You'll need to speak to this audience through their peers, the ones that are highly respected in the community.

Now, another dimension to take a look at is the brand affinity. This is not limited to your industry either. Looking across all of the brand affinities that your audience has, you get a better understanding of the whole person. The other brands that your audience feels affinity to, provide valuable insight as well as opportunities for social media marketers because even if they aren't seen as direct or indirect competitors, they're still competing for the attention of your audience. For example, I do not compete with Virgin America because I'm not a travel company. But knowing that my audience also listens to Virgin America means that I should probably pay attention to what Virgin America is saying that makes them worth listening to. I could use this information in a number of ways, I could reach out to Virgin America in the future to collaborate on projects, I could reference Virgin America in my content. I could share a content that is produced by Virgin America. And I could target ads at people who are interested in Virgin America because the audiences look alike.

Knowing what other brands my audience is interested in can give me all sorts of ideas on how to reach them, bond with them, and build trust with them. Now, on to general interest. You need to understand the broader interests of your audience as well. For example, where they find affinities in categories such as popular culture, sports, hobbies. Once you understand these broader interests, you can create more relevant content for them. You can get insights to some of these interests from the some of the tools that we covered such as Twitter analytics, Affinia and social listening. Again, when I look at my own Twitter audience on analytics, I know that my audience is interested in technology and entrepreneurship. So I know what kind of content is going to appeal to them. It also helps me understand how to speak to them in order to build those relationships.

And lastly, what motivates this audience and stirs them to share content? Different audiences respond to different types of content. One of my favorite classifications of shareable content is by Jonah Berger in his book *Contagious, Why Things Catch On*. Are there any patterns that you can find in the content that people are sharing that follow his classifications? They are social currency. Sharing this will make me look smarter, cooler, funnier, hipper. Triggers, I want to share this because it reminds me of something familiar and comfortable. Emotions, I want to share this because it made me feel something or it blew my mind. Public, I want to share this so that I can find my tribe. Practical value, I want to share this because I learned something from this, I think you'll learn something from this. And stories, I want to share this because I connected to the story.

By recognizing people's motivations for sharing, we can not only discover more interest, but tap into this when creating our own content for personalizing social media messaging.

# **LESSON 3: COMPETITIVE AND INDUSTRY RESEARCH**

## Competitive Research Overview

Through your audience research you would've been able to identify many of the brands that other sources or audience is paying attention to. You can use this information to try and figure out who your real competition is and whether they're serving your desired audience fully. It's important to note that your competition won't be only about the direct competitors that you're familiar with. As you discovered in the previous sections, the audience is paying attention to all sorts of media outlets, influencers, and other brands and movements.

For example, if you are a company that sells chemical hair straightener to African-American audiences, you won't only be competing with other hair straighteners, you'll also be in competition with the natural hair movement which promotes not using chemicals on African-American hair. Another competitive consideration is how motivated your audience is. Apathy and cynicism in your particular category could also affect your messaging. If your audience feels apathetic or cynical towards your category of product, you may want to speak to that cynicism or apathy in your messaging. For instance, if you were selling a skin cream that truly reduces fine lines, but knowing from your research that your audience is cynical about these claims after many of years of being disappointed with competitor products, you can use this knowledge to address the apathy.

As in, "We know you've heard this before, but..." You can also offer up an extended trial to overcome the lack of motivation to try a new product. In the competitive research section, you're looking to answer, number one, what are they doing to reach their audience? Is it working? What works? This is about researching both what your competition is doing as well as what they're not doing. Number two, who's in their audience? Is it the same as yours, and how well did they connect with this audience? It's about finding out which audiences your competition serves and doesn't serve well. And number three, you will be looking for opportunity gaps in order to create a "Blue Ocean Strategy." One that has less competition and more unique value for your audience.

## Competitive Research Tools

Many of the tools that we already use in audience research will come in handy for the competitive research, but we'll just be using them a little bit differently. An overview of these tools are social media metrics, social intelligence, content audits and analysis, and search. Before researching the competition, I like to create a spreadsheet so that I can compare apples to apples when it comes to things like budget and reach.

I also like to have a framework for my research for qualitative data, like primary market and content strategy. This way, as I dug deep into the competitor's profile, I know exactly what I'm looking for. And being said, "Your framework may shift over your research and analysis," as it sometimes does for me.

Sometimes, later in the process, I'll stumble across a piece of information which will lead me back to the beginning so that I can find the competitive analysis on everyone. But as I've already mentioned, research is never linear. You can use these headings as a guideline for creating your own spreadsheet. Who their target audience is, what types of content they produce to reach this audience, and what works and what doesn't.

One of the ways in which you can get a sense of how well the competition is doing in reaching the audience is to measure their results. There are a few social media metrics tools that you can use to input a page or an account where you do not have admin access. Some of the tools that I've used are Polygraph Media, Simply Measured, and Mention.

What you're looking for in these tools is not only the basic numbers, followers, likes, etc., but also the content that your competitors are sharing. For instance, here's a shot of the kind of data that you can pull when you connect to your competitor's Facebook page to Polygraph. You can see what kind of content has done well, what format it's in, and be able to actually open the posts to take a look at them deeper.

This is a lot faster than trying to scroll through years and years of data on a brand's Facebook page. In Hootsuite, you can add additional listening tabs for your competitors to keep track of their mentions and activities. Step one, create a new tab on your Hootsuite dashboard. You can either create one tab for all of your competitors per platform, or if your competitors are on a lot of platforms, you can create individual tabs for each of your competitors.

Step two, click Add Stream and choose the Search tab. In the Search query box, enter your competitor's account name, i.e., @sephora. This will show all the people mentioning your competitor's brands. Step three, you can also track your competitor's Facebook, Twitter, Google+, LinkedIn, WordPress, and Instagram pages by clicking the page search tab and selecting the relevant social media option in the bar on the left.

This will show you every post they share and interactions with those posts. Optionally, you can also track hashtags across the various networks that are related to your competitors. Now, you can follow along with audience interactions with your competitor's social activity. Not to be confused with Mention that we covered before, Social Mention is like Google but for social mentions that searches across blogs, microblogs, images, and videos that mention a brand or phrase.

All you do is go to their home page and type in a search for your competitor, and it will display all of the mentions of that competitor. You can use advanced search to narrow the type of content that you're searching for. For example, if you only want to see all the images that are posted to blogs related to your competitor, you can narrow the search by images and blogs.

Onto klear.com. Klear, for competitive research, straddles the social media metrics tools and the social intelligence tools. It's brilliant for just typing in the Twitter, Instagram, or Facebook handle of any of the competitors you'd like to analyze and getting an analysis of their content, their engagement, which celebrities follow them and their demographics.

You could also set up competitive monitors to track how you're doing in comparison. Refer to the screencast in the video presentation for a guide on how to do this. Affinio also has the capability to do competitive analysis based on the analysis of multiple accounts at once. Refer to the screencast in the video presentation for a guide on how to set this up.

In this example, we analyzed the top 10 London department stores to see how each store does amongst interest-based communities. This visualization showcases an overview of the tribes who like department stores on Twitter. Some of these include moms, interior designers, and beauty bloggers, as you can see from this visualization.

The small dots in the visualization, well, they represent the tribe members, and the size of the color areas are the size of that tribe. The lines between the members show any sort of crossover or cross-pollination between the tribes. But this is where it gets really cool, because when you compare the market share for each department store on each of these tribes, you start to see which audience each store appeals to the most.

Interior designers love Liberty and Fenwick. Foodies love Fortnums the most. And beauty bloggers, they love Fenwicks. You can find these charts under the competitive tab in the report. After you use the tools to gather this data, you'll be more easily able to do a bit of a content audit.

A content audit is the process of evaluating content elements and information assets on a part of or all of a website. In our case, we're going to look more at social content than anything else. Number one, top content, what content performs best, i.e., has the biggest reach, has the most engagement, likes, shares, that sort of thing.

Number two, content mix. This refers to the media of the content, audio, video, image, text. Number three, content strategy. This is who they're targeting with their content. Number four, content frequency. This is how often they're posting their content to the different networks. Number five, paid versus organic.

Now, this one's not as easy to tell the difference between the two, but you can usually tell if something has a high reach and lots of engagement or high reach versus low engagement. Most often, the high reach, low engagement is paid for. And then, number six, anything that is out of the ordinary. For instance, if they have a bump in engagement over a period of time and it doesn't look paid for, how did they strike a nerve with the audience?

You'll also want to take stock of the content across their various platforms, including Twitter, Facebook, LinkedIn, Instagram, blogs, newsletter, white papers, YouTube, Pinterest, Snapchat, Periscope, and more and more. Any and all properties they have should be looked at.

What you're looking to suss out is mostly what their strategy is, who their audience is, and how well it's working. You can also find a lot of data you need to fill in the blanks through search. Through articles, interviews, and case studies, you can usually find the other information that you'll need, like budgets, tactics, and staff.

Sites like Contently do a lot of research and case studies on clients and non-clients that are quite revealing. Video search will also bring up interviews and presentations from members of your competitor's digital team where they'll often go into their own case studies revealing great information. In order to stay on top of news and events with your competitors, you can also set up an alert on Google News search where you can actually have anything new delivered to your inbox daily or weekly, as you prefer.

## **Competitive Research Components**

So now what are we looking for in the competitive research? We've covered many tools, and depending on the research project you may or may not find all the data that you're looking for in all of them. However, as you're doing your research project, you should keep these questions in the back of your mind as you're trying to find answers. Number one, who's the audience that this competitor is focused on? For instance, are they talking to moms? Are they beauty bloggers, sports fans? Number two, what is their strategy to reach this audience? Say for instance they're looking to target beauty bloggers, perhaps they're looking to build trust with this audience by offering helpful content. Number three, you'll also see some of their tactics emerge through this. So once again, if we're focusing on beauty bloggers you'd know that they're offering makeup tutorials on Instagram and YouTube. And Number four, lastly, you'll want to know how well this is actually working for them, how successful these tactics are working out. So back to the beauty bloggers. Are they actually interacting with this content and sharing it? And as another dimension, relating back to when we were discussing establishing your brand capabilities and goals, important information for you to find



out about your competitors is what sort of resources to talent and equipment and budgets that they have.

This isn't always easy data to find as most companies keep that hidden. However, I found that using article search on either Adage or business week or Contently or through YouTube presentations can sometimes tease out this very sensitive information. And then finally, you should be able to start creating a gap analysis. This isn't the traditional gap analysis where you're comparing your performance with your desire performance. Rather it's more of an analysis of what your competitors are doing to find out where there are gaps. So in content, in audience needs, in niche audiences that you could possibly serve better.

Down the Y-axis, list all of the potential tribes that are interested in your product category. You will notice from the audience research that you've already done whether through Affinio, Klear or manually. So for instance, if you're selling a new tea brand, you would want to know the tribes that buy tea on a regular basis. And they could be fashion enthusiasts, fitness and health enthusiasts, dieters, traditional tea drinkers, foodies, or socially conscious buyers. On the X-axis are the content topics and types that the competitors use to reach these audiences. Teavana, a popular North American brand focuses on fashion and fitness and health enthusiasts with lots of bright, attractive images across platforms like Instagram, Pinterest, and Twitter that can be a hip cool image. Fill in the spots along the X-axis on the fashion and fitness and health enthusiasts for Instagram, Pinterest, and Twitter. Another tea brand is Bewley's, a popular Irish brand who focuses on foodies, socially conscious buyers, and traditional tea drinkers. They focus on Facebook and Twitter using more community and consciousness-raising images. After filling in the axis with the various competitors, you will see who are the underserved audiences and platforms that you could focus on if you want a "Blue Ocean Strategy." And understanding how your competitors speak to their audiences will also help inform your future content strategy.

## Industry Trend Research Overview

One of the other dimensions of research that many may miss is that of industry trends. These are changes and advancements taking place in and around your industry category. In a nutshell, industry trends are those potentially disruptive technological advances or entrances that may not seem like they'll be a threat, but it never hurts to keep an eye on them. An example of this is in the financial industry with something that is being called FinTech. Though Robo-advisors like Wealthfront and WiseBanyan seem like risky moves for investors from the perspective of betraying investment analysts, there are some cultural shifts going on that should be taken note of. These scrappy web apps may seem like unlikely candidates for a person's money handling, but after years of losing faith in traditional banks and getting angry with the excesses of Wall Street, studies have shown that the next generation actually trusts these tech startups more than traditional financial institutes. A digital marketer who does not recognize the potential disruptions here will miss the mark on a strategy if they ignore these factors. You need to be staying ahead of these trends to ensure that you don't fall behind on your competition. As you're following along with reading articles, case studies, social listening, and more, you need to be looking for a couple of things when it comes to industry trends.

Number one, of course, identifying any disruptions in your industry. For example, a customer could be launching a new way to connect with customers that could completely change customer expectations. Number two, identify any technological or advancement in ideas or culture that could affect your industry. For example, people tracking their own health metrics using technology could affect a pharmaceutical strategy. And number three, shifting interest amongst influencers and thought leaders in your industry. For instance, if you see thought leaders leaving an industry for another one, or thought leaders pointing to trends in another industry, this could be applied. I prefer



to look at this as a glass half full in any of these cases. If we know the potential disruptions, we can get ahead of them and even leverage them to our own advantage going forward.

So in order to research industry trends, there are a few new tools to add to our already growing toolkit here. We're already following the audience in competition, but this is where we deep dive into our industry as well as a few tangential areas. The tools that can be used for industry trend analysis are number one, industry trend reports, number two, industry newsletters and publications. Number three, emerging technology, newsletters, and publications. Number four, industry thought leaders. And number five, Google News alerts for industry.

## **Industry Trend Research Tools**

So number one, the industry trend reports. These reports are in-depth studies of each industry and are highly valuable. Industry trend reports can be very expensive to transcribe to. However, many of them have newsletters as well as subscription models. Some of them are Euromonitor, which provides not only consumer reports, but industry as well. They generally publish industry reports quarterly which talk about trends and shifts. Number two, Hoover's. These ones are very thorough but they'll probably set you back a few thousand dollars. Number three, IBIS. These are UK based and much like Euromonitor and Hoover's, they do quarterly industry trend reports that are fantastically thorough but costly.

Newsletters and blogs can be a great way to get free and up-to-date information, as well being notified on reports you may want to spend money on. There are two paths that I go down when looking for these. Number one, independent newsletters and publications. Depending on your industry, you'll need to search around for these. You can try klear.com in search. When I was working for luxury research clients, I subscribed to newsletters like Luxury Daily, Internet Retailer, Total Retailer, Luxury News, Luxury Society, PSFK, Planet Retail. Number two, consulting groups. Depending on your industry, there are some consulting groups that specialize in creating industry studies. I've subscribed to the Boston Consulting Group newsletter for years, and Bain and Company also has some really great newsletters. You can find many of these through your social listening and search as people will share what they're reading and lead you there.

Sometimes your industry may lag a little bit behind when it comes to emerging trends in tech and culture, so it's also very helpful to follow along with general technology newsletters and publications to get a sense of what's going on more broadly. Some of the top ones include TechCrunch, Rewrite Web, The Next Web, CNET, and BBC Technology. You've probably already created a list of thought leaders that are influential to your audience, but you can also expand and create more lists in other verticals, such as your industry in general. They may not be influential to your audience, and they may even be competitors, but they may be on top of technology and trends in your industry. They can be leaders of organizations, writers from publications, and researchers, speakers.

You can also create a technology influencers list. You can find these thought leaders on klear.com, you can scan Twitter for existing lists of thought leaders, and you can watch on social listening tools for mentions and re-tweets of articles by these thought leaders that you may have missed before. Finally, you can create a Google News alert by identifying keywords used by journalists when talking about innovation in your industry. In this case, I searched for fashion tech to find articles that refer to technological advances in fashion, but each industry is a little bit different. Once you start reading more newsletters and thought leaders you'll get a better sense of the kind of language that is being used.

# **LESSON 4: CULTURAL RESEARCH TOOLS**

## Cultural Research Overview

Cultural research involves investigating the ways in which culture creates and transforms individual experiences, everyday life, social relations, and power. Culture is deeply tied to communities of interest. With every community of interest there are unique cultural characteristics and trends. And these cultural characteristics and trends will help you uncover insights that will lead to better social media strategies for reaching your audience. Within cultures, the unique characteristics you'll be looking for are, number one, geographic influences. Culturally different areas of the world have different attitudes. For example, Japan is often called the Galapagos of culture because it is so far removed from other land masses. Number two, influential figures and movements. These are the people and movements that affect how the culture will think about certain topics.

For example, Harvey Milk was an American politician in the 1960s, whose very public activism set the stage for San Francisco to think more progressively than the rest of the country about LGBT rights. Number three, language and memes. These are the idioms, acronyms, and other manifestations of language within each culture. Just think of acronyms you use in various business context that will seem like a completely different language for outsiders. Memes are the cultural ideas that are born and traveled through distinctive cultures. Number four, historic and current news. The history of the culture of people will inform current events. And number five, rules and mores. There are often multiple unwritten rules within cultures. For example, you've probably heard of the rule that when greeting Japanese business people that you should always bring a gift. We'll go into what these are and how to do this in this section.

## Cultural Research Tools and Components

So the tools here look very similar to tools used in previous research sections but we're looking deeper into patterns. These tools are social listening, social intelligence tools, research papers, online articles and case studies, and online message boards and communities. If there's one thing that's for certain, we know that different geographic areas still have very unique cultures. Using a tool like Trendsmap is very straightforward. Just go to [trendsmap.com](https://trendsmap.com) and search a location that you're interested in. The map will then come up showing you the trending topics on Twitter in that area. The free account, even without registering, will give you a good snapshot of what people are tweeting about in geographic locations. But if you register you can get even more data. Just one glance at Trendsmap shows us that people in Europe are very focused on different issues than those in the United States. Even though a digital community sometimes cut across geographies, it's still an influence.

I should also note here that as a Canadian who lives right on top of the U.S. much of our news and culture are imported from the U.S. daily, which you can see here in the screen graph from Trendsmap. The proximity and large cultural imports affect Canadian culture quite a bit. When cultures, geographic or otherwise meet, they often borrow ideas from one another. The other dimension of culture research we need to assess is influential figures and movements. This goes far beyond who people follow on Twitter or Facebook, though it can be reflected there. I mentioned in an earlier example that a company that creates hair relaxer is as much in competition with the natural hair movement as they are with other hair relaxer manufacturers. These figures of movements are highly influential to this audience. They set the conversation. They determine the news items. They act as the authoritative voice for members of the culture.

In the case of Steve Jobs, for instance, many of his practices around design are seen as gospel for designers and product managers worldwide. He's often quoted by designers to validate design

direction. Also pictured here, second on the top row is Linus Torvalds. Many of you may not recognize him but he's a very influential developer, sometimes referred to as The King of Geeks within developer culture. He created the operating system, Linux, and has been a popular figure in the open source developer movement. When Linus speaks at a conference or tweets something significant, the developer world takes notice and will adopt his lessons almost instantly. This information will be revealed in your social intelligence reports through Affinio and Klear, as well as through social listening through Hootsuite, Mention and TINT. You will see the hashtags related to the movements that matter emerging in the reports as well as recognize them coming up in various conversations time and time again as you are listening.

During the Canadian Liberal leadership election in 2013, I worked for our now Prime Minister Justin Trudeau on his social and digital strategy. While setting up the campaign I followed the #canpoli which was a steady stream of discussions on what matters to Canadians politically. A few months in a new hashtag started appearing, idlenomore. It was started by a Canadian aboriginal group that had gotten tired of inaction by the government on aboriginal issues. Within weeks I was seeing it every second or third tweet. I knew this was picking up steam and that those that were passionate about Canadian politics and influencing others cared about it too. So I sent all of this data to Justin and the communication teams with the recommendation that he supports the movement. Sure enough my participation in the conversation we had around idlenomore exploded our efforts. We gained thousands of new followers in Justin's supporters. This is the power of recognizing influential movements.

Many cultures have their own language. This isn't just referred to broader languages like English, and Spanish, and French but also to the insider language spoken by groups. These could include slang, acronyms, jargon, nicknames, codes, idioms, expressions, and tech speak. Being able to decipher inside language and then speak it authentically is an important part of fitting in. There are also memes that can only be deciphered through a deep knowledge of a culture. According to Richard Dawkins who coined the term in his 1976 book, *The Selfish Gene*, a meme conveys the idea of a unit of cultural transmission or unit of imitation. A meme could be anything from a ritual, to a joke, to superstition. Knowing which memes are meaningful to a culture could help decode everything from humor, to rules, to rituals within a group. For instance, you may have seen photos with this illustrated image superimposed. In online bulletin boards like 4chan and reddit, this image is meant to convey that somebody is a troll. And a troll in internet terms is someone who makes arguments and rolls people up just for the fun of it. By understanding this meme you also understand a part of online bulletin board culture.

Now, understanding memes will also help you understand what not to do. Have you seen the Twitter account Brands Saying Bae? In a nutshell it's a Twitter account that makes fun of brands who try too hard to be down with the kids. This is an example of not understanding the nuances of cultural language and trying to mimic it to terrible results. The audience isn't stupid. They can see right through brands who haven't done their homework. However, there is a huge upside to brands that have done their homework. In 2014, Nature Valley, the granola bar company, completely won over the anime community on Twitter. One of their followers tweeted that they were going to go buy some Nature Valley granola bars within the same tweet that mentioned that they love anime. The senior community engagement specialist who was running their Twitter at that time saw this and happened to be an anime fan herself. The next step was to introduce that anime fan to other anime fans. However, some community members who were suspicious that the brand would know anything about anime started quizzing at Nature Valley with difficult insider questions. Not only did Nature Valley answer these difficult questions right, they took the discussion to the next level by offering a great obscure language and references. Next thing they knew the entire anime community

started to flock to this discussion and followed Nature Valley. The tweet shown in this slide was one of the illustrative results of knowing the culture and thus winning over fans within that culture.

Understanding the history as well as the current events in a culture will also help you understand what shapes and influences people's attitude within that culture. This will help you gain credibility as you reference history and stay ahead of popular news. Sports is a great example of this. You don't just talk about a football player without knowing the history of that player. Every culture has its own set of unwritten rules and mores. These are standards of conduct that if stumbled over could become a huge problem for a brand.

Now, there are two levels of rules, explicit and implicit rules. Explicit rules are the laws, the codes of conduct, terms of use, community guidelines, and other rules that are written down somewhere and if you break them are usually enforced with some sort of policing. So, for instance, on Facebook, if you post hate language, your account will be removed. Implicit rules are a lot more nuanced and actually could be really damaging without you even knowing that you've damaged yourself. These rules are usually unwritten and the punishment for breaking them is community ostracization. So, for instance, in one culture, you greet someone with a gift. And in another culture it's with a double cheek kiss. In another culture it's with a handshake. Crossing over any of those barriers could be awkward. Online it works exactly the same.

Different platforms, as well as communities within those platforms have their own rules and mores. For instance, on Twitter, it's generally frowned upon to overload your tweet with hashtags unless it's a joke. People will see overloading your tweet with hashtags as a plea for attention and write you off as a self-promoter. All of these dimensions will be vitally important to your success as a digital seller.

# **LESSON 5: DATA ANALYSIS AND STRATEGY**

## Analyzing Data to Find Insights

As discussed in the very first section, insights are about answering the why and not the what. By now you will have a lot of what gathered. The why is found through human analysis. You will need to pull all of the components of your research together to find the common threads, overlaps, and trends, and there is no easy answer to this. If anyone has seen the TV series “Homeland” and remembers that complex wall of images and strings and articles that Carrie Mathison puts up to try to find her insights, your process will look a lot the same. Though, you probably won’t put things up on a wall. You’ll spend a lot of time sifting through data to find those patterns. So there are few processes that I use that will help you do this. The first process that I like to use is using a SWOT analysis.

SWOT, for those who are unfamiliar with the acronym, stands for strengths, weaknesses, opportunities, and threats. Though many SWOT analyses are created by looking at your competition, this one is more centered on your audience. So when you’re thinking about your strengths, for instance, think about them in relation to your audience perspective. On strengths, where do your assets and values overlap with your audience? Where can you find strong, common ground? What is it that will make you a clear choice? Weaknesses. Are there any audience perceptions that could hurt you in their eyes? Where are your values, offerings, products, and services incongruent with your audience needs and wants? Opportunities. If this is an audience that is untapped, there could be an opportunity that you didn’t recognize at first. Or, if you’re established, maybe there’s a new angle to reignite an old conversation. And threats. What are the cultural threats, emerging attitudes, industry threats, emerging technologies? As you watch and learn from your audience, you can fill these in.

Now, one of my favorite terms ever, onlyness. According to thought leader and Harvard Business writer Nilofer Merchant, the way we create value has changed. It’s not enough to offer a unique angle or just to be differentiated. In the social era where everyone can be a publisher and choice is endless, onlyness is that thing that will make us stand out. Your onlyness refers to that unique point of view and experience that only you can bring to the table. It’s your experience, your knowledge, your history, your vision, your passion, and everything else that makes you uniquely you. But what does that have to do with any of this? As a consideration, when it comes to connecting the dots, you have to think back to the beginning when we discussed assets and resources. As a digital marketer, you know your product, service, company, history, etc. inside out. At the end of the day, what you offer your audience can only come from you.

Some of you may be familiar with a company called Moleskin. They make notebooks, but not just any notebook, of which there are many, but a special notebook that has become beloved to their audience. And how is it that a company that makes notebooks launching in 1997 during the upswing of the digital revolution grew to sell 10 million books per year? They found their onlyness in a piece of their history that appeals strongly to their target audience. In the literature that a company’s every notebook is a story that goes, “It all started many years ago with a pocket-sized black object. The product of a great tradition, the Moleskin notebook is, in fact, the heir and successor to the legendary notebook used by artists and thinkers over the past two centuries. Among them, Vincent van Gogh, Pablo Picasso, Ernest Hemingway, and Bruce Chatwin.” Though the Moleskin of today may be very different from the notebook by these artists in history, this history is unique to Moleskin and their audience, creative professionals who are obsessed with design and nostalgia. They found the perfect message to reach this audience by finding their sweet spot.

So the sweet spot. Once you find your onlyness or your unique point of view or offering, draw a circle and name it. For example, say, I’m luxury paint and wallpaper company, Farrow and Ball. So my passion is for creating high quality, meticulously designed wallpaper, and high quality eco-friendly

paint. I never take any shortcuts and I have a long history of quality. So then now that you know your audience, or potential audience, draw a second circle that overlaps yours realistically. This is where your onliness and point of view meets your audience's interest and needs. For example, interior designers who work on historical restorations, high-end hospitality, and iconic interiors. The overlap is in the obsession over quality and the detail of the color. The third section that you draw is where you remove part of that overlap. So, for instance, luxury interior design magazines that also appear to high quality and high-end products.

What is left over? That's your sweet spot, the place where your goals and your onliness and your passion overlaps with your audience needs and wants and passions, but then removes the major competition. So, in this case, an obsession over color. Now, remember in the beginning when I said that facts are the what and insights are the why, don't look at individual numbers such as followers or number of posts per week. Instead, take all of that data together to see if there are patterns emerging in specific areas. Then, look for strong relationships between the data points, such as connections between tribes, connections between competitors and tribes, and connections between the data points themselves. Also look for surprising anomalies in the data, things that you didn't expect to happen or seem a little out of place.

But even the best research doesn't always tell the whole story. Sometimes there is a story between the threads, such as the example that I mentioned earlier about the red pen. It took an understanding of teachers to start to see that red pen emerge and re-emerge and to tie it back to their experience. And finally, you should ask the five whys of data. The five whys refer to the number of questions that you have to ask of your initial insights to get to the nugget of the insight that will drive your strategy. The first statement that you make will probably not be in-depth enough to lead to an actionable insight, so you have to ask why several times. Five times is the recommended, hence the five whys.

Based on a very powerful insight, in 2004 Dove turned the beauty marketing world on its head, and still 12 years later it's still setting the standards. Though this is a fictional exercise, follow along with me on how the five whys could play themselves out with Dove. So, first, the problem. You're losing market share in face wash. This is the data point. And the first question would be, Oh, why? Because women are buying higher end products, and why is that? Because women have been convinced that spending more money on skin care is better. Well, why is that? Well, because this marketing is preying on their insecurities. And why is that? Well, because women have more insecurities about their looks. And, well, why is that? Well, because from a young age, women are told that we have to look a certain way to be valued. Bingo.

Unravel the cause to lessen the effect. And voila, here's the statement, "We see beauty around us. At Dove, we want to help free ourselves and the next generation from beauty stereotypes." It's this message that's at the heart of our campaign for real beauty and self-esteem fund.

## **Strategic Statements**

So now we write a strategic statement. First off, what is a strategic statement and how do you write one? Though I'm not as bullish on the structure of the statement, I know that structure sometimes creates the parameters for creativity. At the end of the end, the strategic statement should be something you can go back to time and time again and ask yourself, "Does this tactic or approach align with our strategy?" It should also be clear and straightforward, not full of jargon or promises.

Strategic statements should be structured under the following headings. Number one, audience. Who are the intended recipients of the message? Number two, differentiator, how the company is unique from its competition. And number three, success metric. How are we going to measure how



the strategy is working? When I structure a statement, I link it to these headings by asking three questions. To go back to the Dove example, you might answer the questions like this. Number one, who is my core audience? Regular women who are tired of feeling bad about themselves through beauty ads. Number two, why would they care about my product? Dove has a long history of providing good products at good value that are unpretentious. And number three, what am I measuring as my core success metric? That would be gaining back market share from higher price brands whose messages were combating. Also measuring positive discussion around the idea of real beauty.

So a sample statement would look like this, “Dove’s strategy is to empower women who feel unrepresented by beauty marketing. We’ll know we’re successful when women switch from expensive brands that prey on their insecurities to Dove products and celebrate all shapes, colors, and forms of beauty.” The general template for a strategic statement sounds something like this, “Our strategy is to reach blank, this specific group of people, with this message that differentiates us. We’ll know we’re successful when, blank, we reach this particular metric which was based on our original goals and is aligned to the audience and the message.” As you can see, the same Dove statement has provided great fodder for going forward.

As you move forward, the team can always ask the three questions. Number one, does this tactic reach our target audience? Number two, does this content speak to the message and differentiating point? And number three, are we closer to reaching our goal? The mark of a great strategy built off solid insights is that it can power the rest of your social media strategy, whether it’s messaging, paid advertising, content marketing, integrations or engagement. And to note, once again, the social research is never complete.

The social listening you’ve worked to set up during this module will help you get smarter and smarter about your audience, which will ultimately drive deeper engagement online.

