

9

How to Use Digital Analytics to Inform Marketing Programs

Thus far, we have spent time talking about how the media landscape has evolved, grounding you in the basic digital analytics concepts, and detailing how to use digital analytics to understand a brand, audience, and ecosystem. With these basics in mind, we now pivot toward use cases. The most common use case for digital data is, of course, to support the development of marketing programs—whether it involves understanding the audience, how that audience engages with content, or where the audience tends to spend their time online. The possibilities for the data are endless, especially as the tools themselves evolve to meet customer needs. It is important to note that other use cases could exist in addition to the ones we present. What we offer are the use cases most commonly used by organizations of all sizes.

The most common use case for social and digital data is marketing. That is, you take the data points created by your customers' online activities, develop insights from them, and then use those insights to alter or create marketing strategies and tactics. Most companies begin their journey toward using digital data by using it to inform marketing programs. As organizations mature other use cases such as using data to anticipate a crisis or inform product development (use cases discussed in upcoming chapters) become more prevalent.

Where should you get started using digital data to inform marketing programs? The first step is to refer to the first two chapters of this book on the converged media landscape and the basic digital analytics concepts. The second step is to read the remainder of this chapter. For the purposes of this chapter, we focus mostly on using digital data to inform marketing program planning.

Based on our experience, the following handful of elements are important to understand when you are using digital data to inform marketing programs:

- **Audience**—Likely the most important, and likely the thing marketers take for granted the most. Marketers often assume that their traditional segmentation models are the ones they should use to target through external outreach. That's exactly the wrong approach, and one we consider to be lazy.
- **Content**—The amount of data available to us about content performance is staggering. Not only do we know whether a member of our target audience likes videos over images, but we can get as granular as the video format, length, subject matter, and distribution. For any marketing program, that level of granularity is critical.
- **Channels**—Said simply, a critical marketing planning input is where our audience tends to spend the majority of their time online. Without this knowledge it is entirely likely that we will try to engage our target audiences in all the wrong places.
- **Previous campaign performance**—It was George Santayana who said, "Those who cannot learn from history are doomed to repeat it." That couldn't be truer about marketing programs.

Within each of these four categories are a number of data points that you could gather to effectively answer them.

Throughout the rest of this chapter we highlight three different types of digital analytics projects you can undertake to understand audience, content, and channels.

We assume that you know where to go to assess the performance of previous campaigns:

- **Social media landscape analysis**—A landscape analysis can afford marketing organizations many things. It can tell you where the audience congregates and shares content, tell you what the key conversation themes might be, give you a window on who the audience is, and begin to give you a sense of how media is consumed. Importantly, this data is applicable for not only your brand but your competitors as well.
- **Search and owned analysis**—When you are conducting a search and owned analysis, it is important to understand the keywords and phrases that people use, those keywords and phrases that bring people to your website, how people engage on your website, and how people feel about the experience.
- **Media analysis**—The media analysis is one part understanding past performance, and one part conducting research through the use of third-party research tools.

The following sections talk about how each of these different analyses is conducted and what you should expect to get out of them.

Understanding the Social Media Landscape Analysis

Believe it or not, when we wrote the first version of this book, social media was still fairly experimental for large organizations. The early adopters at the enterprise level were working under the belief that launching a presence in social media would offer a closer connection to customers. Although that proved to be the case, some of those early brands were placing “bets” on channels that could have failed just as easily as they succeeded. We realize that pointing out social media success stories as possible failures probably is a little confusing but hear us out.

If you are managing the digital marketing, traditional marketing, or public relations for your company, or if you are working for an agency, wouldn't you like to have access to data about how your customers (current or potential) are behaving online? Wouldn't you like to know the kinds of words they are using to converse? Wouldn't you like to know their preferred channel for conversing? These are just a handful of things you could learn from a landscape audit.

The social media landscape audit has become a critical input into the marketing planning process. It is not that the days of social media experimentation are over. Quite a bit of experimentation still takes place. However, the difference today versus five years ago is that experimentation is now done more thoughtfully and is only a small slice of the marketing budget. Today, marketers of all kinds are looking for data and justification for launching a particular online strategy or tactic.

 **Note**

Although in most cases a landscape audit is done at the start of a program, it can often be done after social strategies and tactics have already been implemented. The audit can also follow any other preliminary listening efforts that might have taken place.

The following sections describe the steps needed to complete a landscape audit.

Scoping the Landscape Audit

The possibilities with a landscape audit are endless. If you are working for or representing a large brand (such as Disney, Dell, Pepsi, Coca-Cola, or Cisco) you are likely faced with a diverse business with multiple products or business units or both. Because of that diversity, a landscape audit could easily go from being a very good idea with strong insights to be a really bad idea with hundreds of slides of data telling no real story. How do you avoid the second scenario? As with any other project, developing the proper scope helps mitigate the possibility of receiving a data dump at the end of the project. Developing a proper scope involves six key steps:

1. **Outline the brand objectives**—Whatever the marketing program, clearly defining the business objectives is imperative. Without those brand or business objectives in mind, the insights delivered from the research are likely to be flawed.
2. **Determine an area of focus**—A landscape audit is meant to be comprehensive. However, *comprehensive* can be a bad word when it leads to a mountain of data and very little insight. Defining what you are going to be searching for when conducting the analysis is important.
3. **Develop a set of keywords**—After determining the scope, creating a set of keywords is essential. It cannot be a random set of media monitoring keywords that have been used forever, though you could make such a set as one input. There are often several different inputs to a set of keywords. We offer more detail on this in a moment.
4. **Understand data inputs**—While using the term *landscape audit* might signify only the use of a social media listening tool (see Chapter 3, “Choosing Your Analytics Tools”), in reality it could be much more comprehensive and include other data inputs.
5. **Define the research question(s)**—Outlining the question(s) you are trying to answer with your research is critical to an excellent end product. In Chapter 13, “Building Your Research Plan,” we talk about developing your research plan and hypothesis.

- 6. Build a time line**—The research you are going to conduct cannot go on forever. When does the project begin and end? When are the interim check-ins for the project? How much data will you be collecting for the project? A typical landscape audit encompasses about 12 months' worth of data. It is worth noting that not every social media listening solution comes with 12 months of data automatically. Oftentimes you need to request the additional data, and might have to pay an additional charge

If you walk through all the steps in this list, your landscape audit scope should be good, and your resulting research report will be very insightful. There still remains the problem of needing all the information in one place; this is critical because we are all busy and attend too many meetings. If a critical project partner misses a meeting about a landscape audit, that person needs to know where to find the documentation. The scoping document helps ensure that knowledge transfer is seamless. This document should be broken up into the following sections:

- **Details of the project**—This could be something as simple as the owner of the project within your organization, the original requester, and the amount of budget being allocated for the project.
- **Project scope**—This part of the document contains the brands to be included in the analysis, and the products, regions, languages, and time frame for the analysis.
- **Situation overview**—This part of the document states why your organization is conducting this research. This is essentially the same as the brand objectives step outlined earlier in this chapter.
- **Research objectives**—Who is talking about the brand online? What are the key topics of conversation? Where do the majority of conversations take place? These are just a few of the sample research objectives or questions you could ask.
- **Existing data**—There may be data that the team needs to reference as part of the landscape audit. This data could include existing market research, search analyses, web traffic data, or any brand plans. This section of the document can include links to those documents or, at minimum, the key takeaways from each of those other pieces of research.
- **Type of deliverable**—In most instances, the type of deliverable will be outlined as a presentation with key insights. However, people in your organization might want multiple formats (for example, a Microsoft Word document, PowerPoint presentation, or Keynote presentation) for delivering the data. Ensure that you know all the format types needed before getting to the end of your project.

- **Desired delivery date**—Again, these projects cannot go on forever, but they can be labor intensive. Give your team some time to produce the report but be clear in the scoping document what your expectations are for the date of delivery.

When your scoping document is created, you can actually begin the landscape audit. The next section outlines all the elements of a best-practice landscape audit.

Note

Many of these foundational elements that make landscape audits successful are applicable to the two other types of analysis—search and owned, and media analysis—that we discuss later in this chapter. Keep them in mind as we reach those sections.

Elements of a Landscape Audit

When your scoping document has been created, it is time to start conducting your research for the landscape audit. By this point, you should have decided on your social media listening tool and have developed a set of research questions you want to answer with your research. You should also have a firm understanding of the topics you are researching, the brands you are including from an internal perspective, and the competitors (or peers) you are using for comparison.

Even when you have a well-crafted scoping document, a very real possibility still exists that you are infected with analysis paralysis, and you can download hundreds of thousands (if not millions) of conversations, analyze them, and put them in a slide deck that lacks any insight to help the business. The reality of social media data is that it is plentiful, and analyzing it can often be daunting. A scoping document helps, but some guideposts about what should be in the report are even more helpful.

Our best suggestion is to ask around before trying to determine where those guideposts truly lie. Ask other divisions within your company if they have conducted this type of research. Ask your peers at other companies if they have done a landscape audit. Heck, ask an open-ended question about landscape audits on social media channels if you think you would get a good response.

You might be hoping that we'll provide you with those guideposts. We can give you some ideas, but keep in mind that they are general suggestions. What we suggest is generic help that comes from our experience doing hundreds of such audits for brands of all sizes. The following list addresses several things you should be trying to answer with a landscape audit. What you pick from this list needs to be based on your brand's objectives and the research questions you are trying to answer:

- **Current share of voice**—Share of voice is the percentage of conversation happening about your brand versus about competitor brands. Those competitor brands should have been identified in your scoping document.
- **Current share of conversation**—Share of conversation is the percentage of conversation happening about your brand versus about the entire category. For example, if you are conducting a landscape audit for Dell, one of your measures could be looking at the volume of conversation about Dell versus about personal computers. The share of conversation would be calculated by dividing the volume of conversation about Dell by the volume of conversation happening about personal computing. In our experience, this number almost never exceeds 5%.
- **Location of conversations**—Your landscape audit should identify which channels contain the most conversation. That could be Twitter or news, as is typically the case if you are conducting a landscape audit at the corporate level. It could also be blogs and forums, as is often the case with brand-level analyses. Wherever those conversations take place, you need to know about them.
- **Key conversation themes**—A critical input to developing content on any channel is understanding what the online communities already talk about. This could be themes that mention your brand, only the competitors, or only the industry. A landscape audit should help you identify what people are passionate about when mentioning you and also where the opportunity lies when your competitors are mentioned.
- **Individuals or outlets driving conversation**—The landscape audit should begin to identify which people are mentioning the brand, competitors, or the industry most often. We talk more about influencer analyses in Chapter 8, “Understanding Digital Influence.”
- **Keywords people are using online**—Much like identifying the themes, the landscape audit is meant to identify what words people use when mentioning your brand, competitors, or the industry. The goal of identifying the keywords people are using is to ensure that your content also uses those words. This helps you speak the community’s language, and it also helps with natural and paid searching.
- **When conversations take place**—If you have conducted any landscape audits in the past, you have likely seen a volume line graph with spikes showing peaks in conversations. You should be looking for when people are doing the most talking about your brand or the industry in order to properly sync your content with that trend. This part of the analysis should also help you understand which conversation themes have really resonated.

These are the high-level elements of the landscape audit. Obviously, the amount of research you do against any one of these points can be quite extensive, based on the volume of activity and your overall goals for the project. However, every one of these elements should be included in your landscape audit at some level. If you do not include one of them, you will leave a gaping hole in the finished product that might result in missing a key insight that could help the business.

Fitting the Landscape Audit into the Program Planning Continuum

It should be relatively obvious that a landscape audit is most useful when it is completed before you create digital strategies or tactics. A landscape audit is a rich source of intelligence about your customers, the industry, and your competitors. It's so rich that coming up with a digital strategy, or even developing content without conducting the audit, would be terribly shortsighted. If you move ahead with the development of a strategy and tactics before conducting a landscape audit, you could enter the community talking about something completely different from what the community actually wants to hear. Trust us when we tell you that doing that is far worse than spending four to six weeks conducting a landscape audit and determining what people would like to hear.

All this being said, a landscape audit could be conducted at the end of a program to either change the course or gauge the effectiveness of your program. Yes, it is a measurement tool as much as it is a planning tool. A company that conducts a landscape audit at the end of a program or while a program is currently underway typically does it to inform the future state. That is a perfectly acceptable use for an audit, but it's important to know that it might result in the revelation that your current program strategies and tactics are flawed based on the research.

Caution

Before moving on to talk about search and owned analysis and its role in informing marketing programs, we should note that the landscape audit is not a be-all, end-all solution. Sure, it has tremendous value and gives us great intelligence on our industry and customer. However, it should never be assumed that what is unearthed in the landscape audit is the entire story. Tom Webster, vice president of strategy and marketing for Edison Research—an organization that conducts market research and exit polling worldwide—is fond of saying that social media research (or, in particular, landscape audits) can allow us to ask better questions as marketers. We completely agree with this sentiment. A landscape audit is only one piece of the marketing planning process.

Search and Owned Analysis

As we discussed in Chapter 1, “Understanding the Synergetic Digital Ecosystem,” the various online channels available to marketers today are colliding. How people interact with your brand in search is likely going to lead them to an interaction in social media, which may lead them to an interaction on an owned property. Before we go any further it might be helpful to define what we mean by an owned property. By *owned property* we simply mean a method of content distribution that is entirely owned by someone within your organization. Very specifically, in this case, we mean your website. Now, returning to the point of this section, while understanding the landscape audit outputs as we previously discussed will give you a lot of invaluable data about who your audience is, what they like (and don’t like), and where they interact, it isn’t everything you need to know.

Search analysis represents an excellent data source to inform your marketing programs. Why do we say that? Simply put, while the landscape analysis helps to really identify the content creators, not everyone in digital marketing is a creator. A much larger number of people engage in online activities to learn about a brand, product, industry, or group of companies. This more passive behavior about our audience provides a window into how they might like to be reached in the future, assuming direct outreach isn’t appropriate. We talk about search and keyword analysis tools as part of several chapters throughout the book so they are not the focus in this section.

Instead of focusing on the tools, we want to point you to a series of *search* data points you might find useful for planning marketing programs. We think there are several:

- **Keyword and key phrase volume**—Every brand that we have ever worked with is interested in ranking highly for specific keywords in search engine results pages (SERPs). The keywords and phrases that your company might rank highly for today aren’t necessarily the ones you want to rank highly for in the future. To truly optimize and build the right content for maximum search visibility it is important to understand what words and phrases are searched for most often.
- **Device type**—If you believe like we do that delivering the right content at the right time with the right message to the right audience is the most critical mission marketing has, then you will likely agree that understanding the right distribution vehicle is almost as important. We are going to assume that you are aware mobile searches are trending higher than desktop searches these days, so understanding what device people use to search using those critical keywords and phrases related to your brand is critical.

- **Page depth/time on site**—Search tactics are most often employed to improve visibility and drive the desired audience to an owned property. Therefore, understanding how deep people get within your owned property and how much time they spend on your site after arriving from search is critical.
- **Time series analysis**—Similar to the phenomenon we discussed in relation to a landscape audit, trending how people are searching is important. If there are matching trends between the social conversations and the search trends (and there often are) then you have a window into when and how you should engage with your audience
- **Search gap analysis**—A step not often taken when conducting a search analysis to inform marketing programs is looking at the keywords utilized on your owned properties and aligning them with the words most often used in search. This gives you a ready-made way to optimize existing or develop new content. It also helps to improve visibility and engage with your audience most effectively. Think about your own web browsing behaviors. When you search for something, land on a brand's website, and find what you want, how happy do you feel? Please take the steps to identify this gap.

Many, many more data points come from analyzing search behaviors but those are the most important in our estimation. You probably noticed some of the analyses listed sound an awful lot like owned channel analysis, and you would be correct. Again, the converged media landscape is the order of the day. It's impossible to study one channel without studying your entire ecosystem.

With that in mind, we want to similarly outline the data points you could be looking at from your *owned* properties to inform marketing programs. Again, several possibilities include:

- **Visitors**—Yes, this should be an obvious one, but we don't just mean looking at the number of people who come to your owned property. Just as important is the "who," meaning the characteristics of the people who come to your website. While the two largest web analytics platforms, Adobe and Google, give you some out-of-the-box information about your audience, supplementing that data using first-party information collected via your data management platform (DMP) will be important. If you need a refresher on what a DMP is and can do, please refer to Chapter 2, "Understanding Digital Analytics Concepts."
- **Device type**—Yes, this is a duplicate from the preceding search analysis section, but it is equally as important here. Understanding what devices people use to visit your owned property can give you a good idea on

what type of experience to build or what types of content would be most effective. Again, out-of-the-box solutions like Adobe Analytics and Google Analytics offer users the ability to ascertain this level of detail.

- **Video performance**—Forgive the somewhat vague, “video performance” description, but it is critical. More companies than ever before are hosting videos on their websites. It is important for you to know how many video plays have occurred, what the play rate was and how often those video views were complete.

Time on site—This is another carryover analysis from the preceding search section, but important to call out here as well. Be aware, time on site could be a false indicator if people come to your site and leave the browser window open for an extended period of time. Because of that possibility, we like to overlay time on site with number of pages visited to get a true sense of engagement.

- **User experience surveys**—Most large companies conduct focus groups and/or surveys to better understand what people like and don't like about their owned properties. If you have this data already about your website, that's great. If you don't, consider engaging a company such as OnResearch, which specializes in these sorts of user experience tests. You would be surprised at the level of audience and content insight you will be able to glean from this work.
- **Social and web content gap**—Do you utilize your social channels to drive audiences to an owned property? Do the words you utilize in your social content align with what a member of your target audience would see on your website? If so, that's great. If you think there's a chance that the answer is no to these questions, go ahead and conduct the assessment.

At the end of the search and owned analyses you should have an even better sense for who the audience is (whether they engage or not), what types of content people are interested in, and where your audience is spending the majority of their time. There is one last step that you should consider taking when planning your marketing program, and that is conducting a media analysis. Let's dive into that next.

Conducting Media Analysis

The last phase of your research to inform a marketing program is conducting a media analysis. You might be asking, “Weren't we looking at media as part of the landscape audit, and search and owned analyses?” You would be correct, but what we mean by *media analysis* is looking very specifically at the performance of your previous media efforts through display, online video, and television tactics coupled

with primary research. We mentioned earlier that this section is a mixture of understanding past performance with doing new and unique forms of research.

Let's start with the former—understanding previous media efforts. For the sake of the rest of this section, we are assuming that your marketing program will be executing some form of media. It's growing increasingly impossible to avoid it, even if your intention is to execute almost exclusively through social media channels. From our perspective, there are two things you should try to understand about previous media performance:

Partner and publisher performance—Every media campaign has a key performance indicator (KPI), or a set of KPIs. We talk about many of the possibilities throughout this book. Regardless of your organization's KPIs for media, it will be important for you to understand which of your previous partners or publishers (for example, the *New York Times*) contributed to achieving those goals most effectively. This isn't to say that you should optimize 100% of your media spend to those publishers that contributed, but seeing how each of them performed uniquely can help you study why certain partners and publishers were more effective than others. The data for such an assessment will likely come from your media agency or some other in-house resource if you are executing media entirely inside your company.

- **Asset performance**—For your media campaign did you see videos contribute to your organization's goals? Maybe display banners proved to be most effective based on your analysis. Was there a certain banner size that was most effective? Again, these sorts of questions aren't meant to guide your creative team to only create videos, or only create banners of a certain size. Answering these questions, though, can help you optimize your spend most effectively.

If your organization is more advanced from a digital analytics perspective, the next logical step would be for you to overlay the performance of partners and publishers with the asset type to get a more well-rounded view. It is not necessarily critical, but if you were looking to see whether it was media or content that drove performance, this would be one method.

The second part of a media analysis is using third-party data sources to understand a host of things from media consumption behaviors, to audience demographics and psychographics, to offline purchasing behavior, to whether or not a physician wrote a prescription for the drug you are currently marketing. As you might have guessed after reading Chapter 3, literally hundreds of third-party data sources are available to leverage. Our intention here isn't to highlight them all, but rather highlight some of the more effective data sources for your consideration.

Here are some third-party data sources that you might consider utilizing as you plan your marketing program:

- **Forrester Technographics Surveys**—If you are not already familiar with this organization, Forrester Research conducts a number of surveys throughout the year to understand audience behaviors far more deeply. What do we mean by audience behaviors? Simply put, this refers to possibilities such as what types of devices they use, where they turn for content, what some of their primary demographics are, and what motivates them to make a purchase. If you are marketing for consumer and/or technology brands, you should consider investing in Forrester Technographics research as it is a rich data source for planning purposes.
- **Kantar Media**—Kantar Media has a number of media intelligence tools for brands to take advantage of, but specifically in this context we recommend investing in Kantar's SRDS Media Planning Platform. Specifically, SRDS identifies which outlets reach your target audience most effectively and gives campaign metrics that help make your partner and publisher decision easier.
- **comScore's Media Metrix**—If you have spent any time in the media planning and buying world, you no doubt are familiar with comScore's tools. Media Metrix provides a relatively complete view of consumption habits of your audience and its competitors, along with demographics and how your audience travels from one media platform to another. It also, as you might suspect, can help you understand the total size of your target audience.

Many other possibilities are out there for you to explore, and you should pick the tools that make the most sense for your business. These are just a few we would highly recommend you have as part of your digital analytics toolbelt.

In this chapter we gave you three different types of analysis to more effectively plan a marketing program. It is important to conduct as much as what we've outlined as possible so you get a clear understanding of your audience, what types of content you need to create to reach them, where you need to reach them, and how you can leverage past performance for your upcoming campaign. Although it might look like a lot of research to conduct, our belief is that your marketing programs will be better off for doing the work.