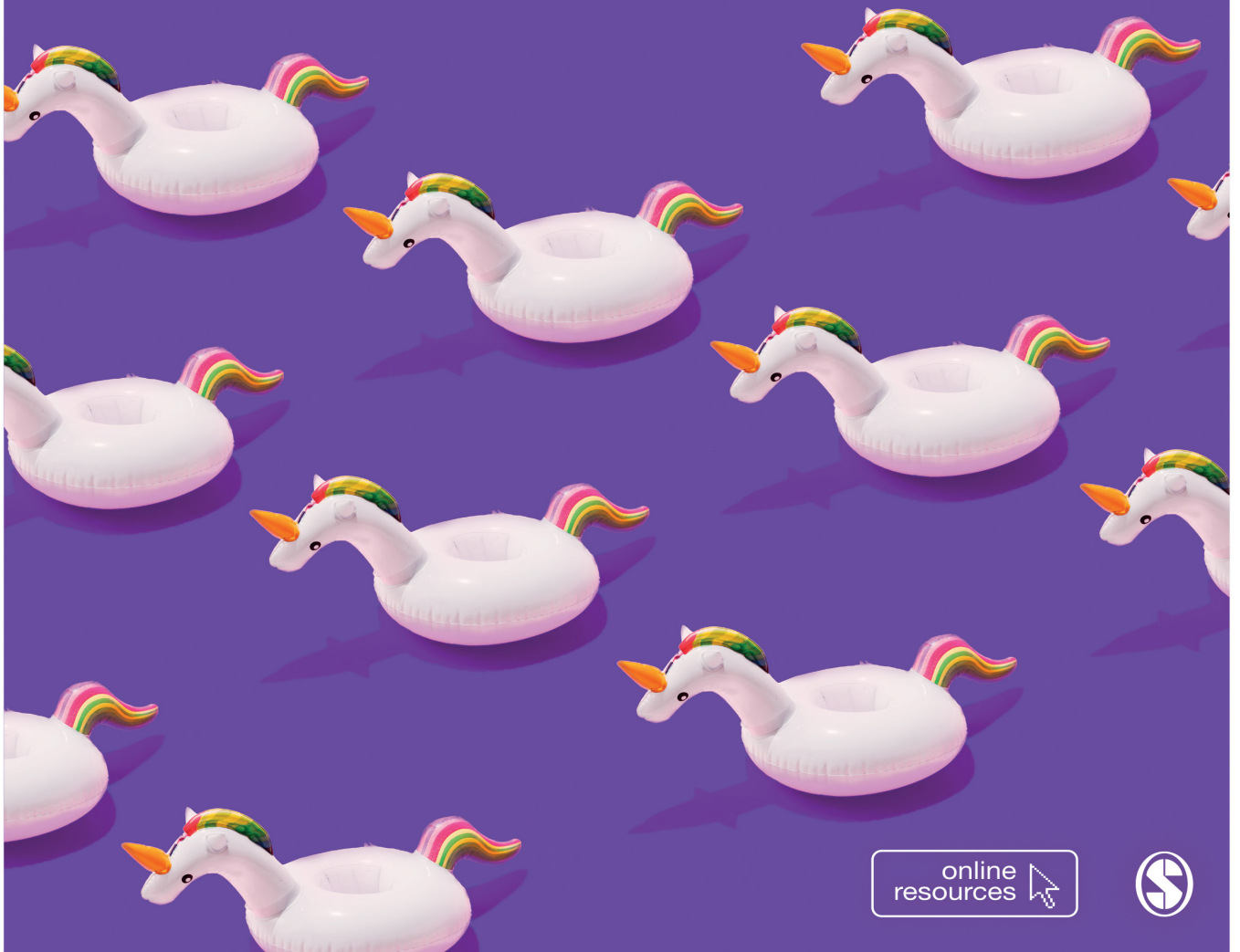


Annmarie Hanlon

DIGITAL MARKETING

STRATEGIC PLANNING & INTEGRATION



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This book is dedicated to Nick, who positively makes all things possible.

To my parents, who were there at the start but left before the ink was dry, Ar dheis
Dé go raibh a n-anam.

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As an early adopter, working in 'online marketing' since 1990, she is a Senior Examiner in digital strategy, a Fellow of the Chartered Institute of Marketing, a Member of the Marketing Institute Ireland and a Liveryman of the Worshipful Company of Marketors. Annmarie is past winner of the Mais Scholarship and her research interests include the strategic use of social media in organisations, differences in practice between generations and the technology that makes it happen.

Follow her updates on Twitter [@AnnmarieHanlon](https://twitter.com/AnnmarieHanlon)

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PREFACE

Digital marketing is a journey that can take an organisation towards new markets, discover new opportunities and protect the current landscape. In the digital marketing journey you can choose to be a navigator or a passenger. As a navigator you explore options, set the course and lead the way. As a passenger you can sit back and take in the scenery or you can lean forward and advise the navigator.

Whilst digital marketing was established 20 years ago and is one of the fastest moving and most exciting aspects of marketing today, there are fewer universities and colleges providing digital marketing education. As a result there is still a lack of understanding and fewer established frameworks to make it easier to adapt business practices and adopt new ways of working. This book aims to provide that understanding and share the latest concepts to apply in organisations, whether you are a student working on a case study, or heading into your placement year, or juggling a part-time vocational marketing module with work.

Students can think of this textbook as a digital marketing roadmap, a blueprint for your digital journey, to enable you to become navigators rather than passengers.

The book contains three key parts. Depending on your knowledge you may start at Part 1 or jump straight into Parts 2 or 3.

Part 1, Digital Marketing Essentials, equips you with a useful context to the digital landscape. Discover the key concepts to understand how we arrived in this new world and comprehend more about the changing digital consumer.

Part 2, Digital Marketing Tools, provides a rich source of the key components. It starts with an overarching toolbox that explores all possible digital marketing tactics, followed by more detail with dedicated chapters on content marketing, online communities, mobile marketing and augmented, virtual and mixed reality. It is critical to understand the tools available before embarking on a digital strategy.

Once you have comprehended the digital marketing tools, this is a good time to explore Part 3, Digital Marketing Strategy and Planning. This part investigates digital audit frameworks to ensure you are ready to develop the strategy and objectives, before building the digital marketing plan. Newer issues, including social media management, managing resources, digital marketing metrics, analytics and reporting, are included. The part concludes with methods of integrating, improving and transforming digital marketing, enabling you to apply the knowledge and tools gained through the chapters.

Enjoy the journey and let's start the campaign to create more digital navigators!

ONLINE RESOURCES



Head online to access a wealth of online resources that will aid study and support teaching, available at: <https://study.sagepub.com/Hanlon>. *Digital Marketing: Strategic Planning & Integration* is accompanied by:

FOR LECTURERS

- **Editable PowerPoint** slides will allow you to easily **integrate each chapter into your lessons** and provide **access to figures from the book**
- **Kahoot! quizzes** will help you **test students' knowledge and understanding** of the materials
- **Instructor manuals** for each chapter will provide further support when **teaching each chapter** and **encourage discussion in sessions**
- A **digital marketing strategy** and **plan template** can be used to **help students get their project off the ground**
- **Downloadable templates** can be **added to course resources** or printed out for use in class

FOR STUDENTS

- Follow the links to **SAGE journal articles** selected by the authors to help you **supplement your reading** and **deepen your understanding** of the key topics outlined in each chapter
- Access **links to helpful websites** with lots of **extra information to reference in your assignments**

PART 1

DIGITAL MARKETING ESSENTIALS

CONTENTS

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1

THE DIGITAL MARKETING LANDSCAPE

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** key issues in the digital landscape
- Apply** communications theories to a digital environment
- Analyse** technology change
- Evaluate** blockchain potential
- Create** a plan to become an opinion leader

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Manage online reputation using third-party tools
- Apply the search engines' EU privacy removal process for unwanted content

1.1 INTRODUCTION

The fast-changing digital landscape provides many opportunities for marketers. It is important to understand key concepts such as ubiquitous computing and how the pace of technology has changed. This chapter explains how traditional marketing models like Diffusion of Innovation are still valid and apply to online opinion leaders, as well as differences between generations.

We explore the meaning and impact of ‘digital disruption’ and ‘the Internet of Things’, with new business models emerging to understand how this applies to consumers. In a world where your personal information has value, you can discover more about ‘big data’ and privacy issues that affect marketing plans. The last part of this chapter considers bitcoin and blockchain and how this might influence the future of data management.

1.2 A NEW ERA

The growth of digital marketing has changed the relationship between businesses and customers. Scholars and practitioners agree that organisations are keen to use digital marketing to engage with their customers and we have moved into a new era where things look different.

KEY TERM UBIQUITOUS COMPUTING

The term ‘ubiquitous computing’ was originally coined by Mark Weiser, who was head of the Computer Science Laboratory at the Xerox Palo Alto Research Center (PARC) when writing in *Scientific American* in 1991 (Weiser, 1991). At that time Weiser commented that in the future there would be computers everywhere and we would not notice their presence; they would just be there.

Some decades later, we have computers at home and with us at university; they are embedded in our mobiles, wearables, in cars, in outdoor billboards – everywhere. We have reached Weiser’s vision that computers are integrated ‘seamlessly into the world at large’ (p. 94).

One of the reasons for these trends and the change in the digital landscape is due to the acceleration in the adoption of new technologies. It took more than 50 years for over 50% of US households to adopt telephones (imagine life with no phone!), nearly 20 years to adopt home computers, yet it took less than 10 years for the same group to adopt smartphones.

In a pre-digital age, you booked a holiday by visiting the travel agents on the high street. It was only on arrival at your holiday destination that you saw what the hotel really looked like. Today you will go online, read reviews, see ‘traveller photos’ or holiday snaps others have shared and ask questions of people who have actually visited the destination ‘IRL’ (= in real life).

1.2.1 THE PACE OF TECHNOLOGY SUBSTITUTION

Writing in the *Harvard Business Review*, Ron Adner and Rahul Kapoor (2016) explored the pace of technology substitution and suggested that the speed of replacement was based on ecosystems. Old technology ecosystems may find product extension opportunities whereas the new technology ecosystems need to counter these challenges. Within their framework there are four quadrants, as shown in Figure 1.1, which can be described as:

- **Creative destruction**, where there are few challenges to the new tech and few opportunities for the old tech, resulting in fast substitution.
- **Robust coexistence**, where the old tech fights back and brings out alternatives and a gradual substitution takes place.
- **Illusion of resilience**, where the new tech moves in with few challenges.
- **Robust resilience**, where old tech fights back and new tech challenges, bringing about a gradual substitution.

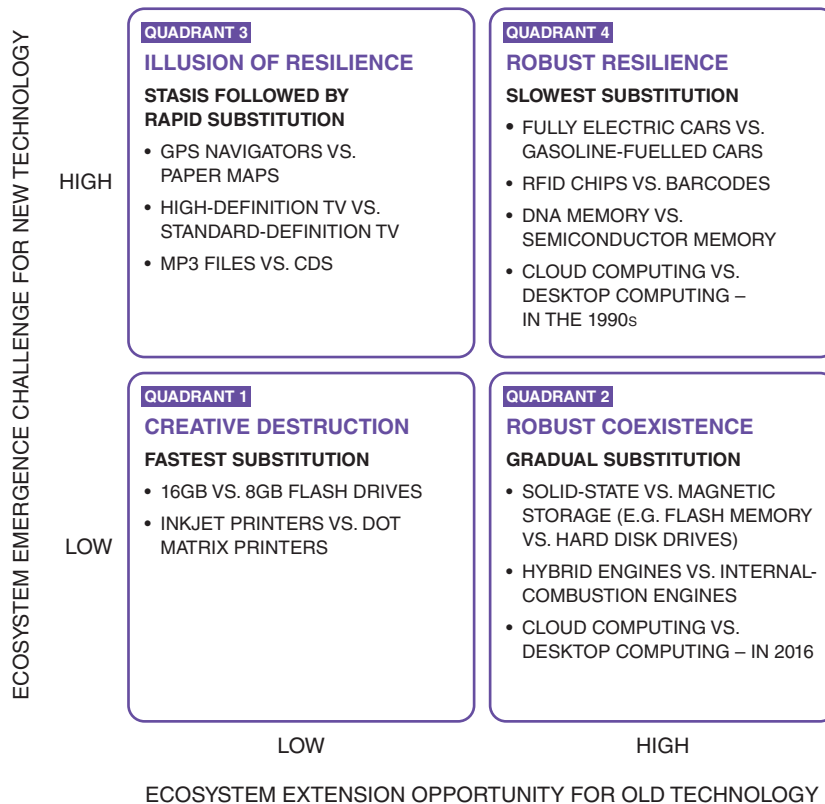


Figure 1.1 A framework for analysing the pace of technology substitution

Source: Adner and Kapoor, 2016, p. 66

It could be argued that there are limitations to this framework as the research was based on a five-year study in the semiconductor manufacturing industry and adoption of new products is not always based on product desire, but also availability. In some countries it is harder to get a landline phone than a mobile. The landline requires wires and major investment whereas a mobile network is simpler to deploy. At the same time, growth in landline telephone ownership is declining sharply, especially in the G12 industrially advanced nations. Explore the latest statistics on the Telecommunication Development Sector (ITU-D, 2017).

Activity 1.1 Analyse Technology Change

1. Working in groups, use Figure 1.1, the framework for analysing the pace of technology substitution, to analyse the types of technology changes that you have witnessed in your lifetime.
2. What were the greatest changes?
3. Why was this?
4. Are there any difficulties ensuring all four quadrants in the framework are included?

How do we learn about new products or what influences our judgement to adopt new technology? In 1944 sociologists and behavioural scientists Paul Lazarsfeld, Bernard Berelson and Hazel Gaudet conducted a study to see how mass media affected voters in the US election campaign for President Franklin Roosevelt (Lazarsfeld et al., 1944). The surprising result of their research was that it was influencers, or opinion leaders, not the media, that had the greatest impact. Influencers, who received the messages from what at that time were mainly traditional newspapers and radio, shared this with their 'followers'.

1.2.2 TWO-STEP FLOW THEORY OF COMMUNICATIONS

The research was further developed by Paul Lazarsfeld and Elihu Katz who named this the two-step flow theory of communications (Lazarsfeld and Katz, 1955) where the media communication was received by the influencer and then passed to other individuals.

There were limitations to the two-step flow theory of communications. It was based on one piece of research, which meant that it was not necessarily generalisable to other situations. It may be that this was a set of exceptional circumstances that could not be repeated. Another issue is that it was a simplistic binary model which assumed that this is how mass media worked. As a result of these limitations, the model was extended from two to multiple steps (the multi-step flow), which was developed by John Robinson (Robinson, 1976) and was used as a basis for other communications theories.

A key aspect of the digital environment is that we have moved from two-step or multi-step to a totally different understanding of communications with newer models emerging, such as media richness (see Chapter 11, Social Media Management) and uses and gratifications theory (see Chapter 13, Digital Marketing Metrics, Analytics and Reporting), although at the same time some much older theories, such as **diffusion of innovations**, have remained valid.

KEY TERM DIFFUSION OF INNOVATIONS

In 1962 Everett Rogers published a book entitled *Diffusion of Innovations*, which was based on the two-step flow of communications and explored the conditions that increased or decreased the likelihood of product adoption.

In this model, based on how a product gains momentum and spreads or diffuses through a group, Rogers proposed five adopter categories – (1) innovators; (2) early adopters; (3) early majority; (4) late majority; (5) laggards – which considered the time at which an individual adopted an innovation.

The five adopter categories were ideal types fabricated to make comparisons, and Rogers recognised these generalisations. There was criticism of the terminology – no one wanted to be considered as a laggard, which was perceived as being a negative label. Table 1.1 shows some of the general characteristics identified, which I have adapted to apply to digital marketing.

The one notable category is that early majority were seen as **opinion leaders**, an idea which was identified in the two-step flow theory of communications and which reverberates within digital marketing as organisations strive to seek those to influence product adoption.

Table 1.1 Adopter categories and general characteristics

Adopter category	General characteristics	% adopters of innovation
(1) Innovators	Active information seekers, often buying the latest gadget – who in class has a pair of Snapchat Spectacles?	2.5
(2) Early Adopters	Opinion leaders who are happy adopting new products, seeking information before others – whose opinion do you seek in class when buying gadgets?	13.5
(3) Early Majority	Deliberate before adopting – active blog readers who like to gather evidence before deciding.	34.0
(4) Late Majority	Sceptical and nearly the last to adopt – they may still own a feature phone.	34.0
(5) Laggards	Suspicious of inventions and only adopt when no choice – perhaps the one remaining lecturer with no mobile phone!	16

Rogers generalised that **opinion leaders** (see Key Term) were more cosmopolitan than their followers. One prescient observation from Rogers was that opinion leaders needed access to mass media and had to be accessible. Think about those opinion leaders with mass followers on YouTube and Twitter – they meet these conditions.

KEY TERMS OPINION FORMERS AND OPINION LEADERS

Opinion formers are *formal* experts. They work in this area, may be qualified or professionally trained and have significant specialist knowledge about the subject.

Opinion leaders are *informal* experts who carry out research and whose knowledge is valued amongst family, friends and followers.

As Lazarsfeld, Berelson, Gaudet, Katz and Rogers observed, the opinion leaders, or influencers, are key to spreading the word about new products and services. These influencers are generating an income from their online following and, according to Forbes.com (O'Connor, 2017), a paid-for social media post can be very lucrative, with fees of \$25,000 paid to a top yoga teacher (e.g. Rachel Brathen) for their endorsement or \$3000 to \$5000 paid to a recognised fitness instructor.

The fees can be higher for specific social media platforms where they have greater numbers of followers and fans, for example:

- \$300,000 for a YouTuber with 7 million subscribers or more
- \$200,000 for Facebook
- \$150,000 for Instagram

In our digital age, as celebrities charge more and more to promote brands, brands are turning to alternatives. We have seen the development of a new type of opinion leader, the **micro-influencer**. Forbes.com suggested that 'an Instagram user with 100,000 followers can command \$5,000 for a post made in partnership with a company or brand' (O'Connor, 2017, p. 1).

KEY TERM MICRO-INFLUENCERS

Carol Scott, whilst director of marketing at a specialist influencer company, described micro-influencers as 'everyday individuals with small, dedicated followings online' (Scott, 2016, p. 1).

Writing in *Adweek*, Emma Bazilian provided a profile of a female millennial micro-influencer: typically aged between 18 and 34 with 2000 to 25,000 Instagram followers, attracting an engagement rate of 3% and higher. Their key topics were fashion,

beauty, travel or fitness (Bazilian, 2017). Bazilian added that the brand marketers could employ these micro-influencers to promote and increase product and brand awareness and specifically to:

- Seed products
- Promote sample products
- Share unbox videos
- Create 'how to' videos
- Develop 'day in the life of'
- Share trending content
- Attend events
- Promote discount codes
- Host product competitions

Smartphone Sixty Seconds® – Evaluate Your Influencers

On your mobile phone search for your favourite influencers. You might follow them on Instagram but they may have additional social media profiles too.

- Find all their online profiles.
- Add up the number of followers on each.
- Find a sponsored post and share with classmates.
- Try to figure out what they were paid for the post and what impact you think it had.

Case Example 1.1 Eltoria Influencer Marketing

Eltoria is the alter ego of Simone Partner and, as an influencer, Simone is not an 'IT girl' or someone who has a famous dad. She had a very different starting point and is a law graduate from the University of Reading, where she gained a 2:1 degree.

In the last year of studying law, Simone's course included one non-law module and she opted for 'entrepreneurship' and for her assessment started the Eltoria UK fashion and lifestyle blog based on her interests. At the time she was working at the organic skincare firm Lush. She enjoyed the module, which was evidenced in her results – a first-class grade. After university she pursued a career in law and her first job was in a big commercial firm, which she didn't enjoy, so she tried a smaller legal firm. However, in both firms she discovered that law was not a career in which she felt she could work for

(Continued)

(Continued)

the rest of her life. Having continued with the blog and subsequently winning many awards, Simone realised that it could be a career option. The awards allowed Simone to take some time off and focus on the blog to see if it could work.

Today Simone has generated an impressive following on YouTube, Instagram, Facebook and Twitter. She is not the average fashion blogger: she's intelligent, her content is well written, with great depth and analysis. Having been at university, she has had typical student jobs in retail stores and understands the challenges faced by those who are working and studying. This may be one of the reasons that she is popular with university students – she understands their situation.

In terms of a typical week, Simone records five to six videos and sometimes works for 12 hours a day to complete the content for a brand contract. There is a lot of work that takes place behind the scenes.

Having created the brand, her website showcases the social media services provided:

- Social media support
- Sponsored blog posts
- YouTube partnerships
- Ambassador campaigns

See more at www.eltoria.com

Case Questions

- What do you think about micro-influencers like Eltoria?
- Did you realise serious lifestyle bloggers could be working 50 or 60 hours a week?

1.2.3 THE MOVE FROM TRADITIONAL TO DIGITAL MARKETING TOOLS

How did we make the move from traditional to digital marketing tools?

As technology has decreased in price, and with the development of the internet, digital marketing has offered easier, but not always cheaper, solutions. Plus, new technology has heralded changes in behaviour (see Chapter 2, The Digital Consumer), resulting in the decline of traditional marketing tools, as shown in Table 1.2.

Table 1.2 The move from traditional to digital marketing tools

Traditional	Digital	Why the change?
Newspaper and magazine adverts	Online adverts; social media, PPC	Newspaper and magazine sales have declined and it's easier to target people online
Door-to-door sales people	Email	Door-to-door is expensive and we can now personalise offers to existing customers via email
Company brochures	Websites	Printing brochures is expensive, so is creating websites, but they are agile and easier to change as needed

Traditional	Digital	Why the change?
Traditional PR	Online PR, blogs	With the decline in newspaper and magazine sales, the number of staff has declined too; online PR makes the process easier
Directories like the Yellow Pages	Search engine marketing	The default is to search online and voice search is growing, so directories have become smaller and are rarely used
Community groups	Social networks	We live in a more mobile world where people move from home towns to find work, so traditional community groups have declined, but social media networks increased

The challenge is that not all generations have made that move, as we will explore in the next part.

1.3 DIGITAL NATIVES AND DIGITAL IMMIGRANTS

If you're a student at university now, there's a good chance that you're a digital native. You've been born into a time when mobile phones, tablets and wearables are the norm. The research says that you rarely watch TV in real time, you'd rather view YouTube. You don't send letters, you use WhatsApp. You don't use Yellow Pages, you ask Siri. As you're using a range of digital tools to talk, shop and share, some of the older generation of digital immigrants are seeking your help to plan and organise their digital marketing.

The words 'digital native' and 'digital immigrant' weren't invented by me; they are part of a range of generational cohorts, which are shown in Table 1.3 with selected reference sources for you to explore further.

Table 1.3 Generational cohorts

Term	Birth years	Selected sources
Baby Boomers	Born mid-1946 to mid-1964	Porter, 1951; Hogan et al., 2008
Generation X	Mid-1960s to the late 1970s/early 1980s	Coupland, 1991; Hamblett and Deverson, 1964
Digital Immigrants	Born before 1980	Prensky, 2001a
Digital Natives	Born after 1980	Prensky, 2001b; Palfrey and Gasser, 2008
Net Generation	Born between 1982 and 1991	Tapscott, 1998
Millennials	Born in or after 1982	Howe and Strauss, 2000
Google Generation	Born after 1993	Rowlands et al., 2008
Generation Y	Born between 1981 and 1999	Bolton et al., 2013
Generation C	Born after 1990	Dye, 2007; Friedrich et al., 2010

Some cohorts cross into another generation. This is because there is no official agreement on the terms, nor are they formally defined by government, but mainly by researchers and consultants working in advertising who see the different behaviours developing.

The terms 'digital native' and digital immigrant' are considered by some as being controversial and by others as divisive. The phrases are largely credited to Marc Prensky, who was teaching groups of students and realised there was a marked difference between the students who had always used technology and teachers who were new to this. He described the situation as similar to learning a new language, where immigrants move into a new country and learn the language but it is never their mother tongue, so they might always retain an accent. In the same way he thought that those who had to learn about technology would retain this 'accent'.

The work has been criticised due to the phraseology and as some people objected to the labels. I'm a digital immigrant but love technology and as an early adopter I could see how it would make life easier. Equally, I sometimes witness students who are digital natives, struggling with newer technologies.

Looking at the most recent group, Generation C, Jessica Dye said this stood for content but commented in her website that it could stand for creativity, consumption or connected. Roman Friedrich and his colleagues at the international management consultancy Strategy& (previously known as Booz & Company) stated that the 'C' represented connect, communicate and change. The key factor is that this demonstrated the lack of consensus with these terms.

1.4 DIGITAL DISRUPTION

Every era sees disruption from newer technologies that replace outmoded methods of delivery, service, production or communication. The introduction of the internet removed the need for the telex machine and soon replaced fax machines as methods of urgent and business communication.

Although the phrase 'digital disruption' probably came about following the creation of the *law of disruption*, named by journalist Larry Downes (Downes, 2009), we don't have an official definition, so we could describe digital disruption as 'major marketplace changes or sector transformation, following the application of technology'.

Bain & Company, one of the world's leading management consultancy firms, has explored the application of digital disruption across industry sectors, as shown in Figure 1.2.

Digital disruption started with the introduction of the internet and initially we had 'brochureware sites' or what Fareena Sultan and Andrew Rohm described as 'the communication of basic Web-site content' (Sultan and Rohm, 2004, p. 8). We gradually moved into online shopping, and today Amazon has extended the disruptive shopping experience with the ultimate disrupter – the Amazon Dash Button, where shoppers simply press a button to re-order specific products (Amazon, 2017).

The internet has evolved from super-slow dial-up to super-fast with data being retained and easy to access. The internet has only disrupted our lives in the last few years, with the rollout of broadband at consumer rather than business level, which enabled faster and easier access for mass markets (see Discover More on the Past and Future History of the Internet).

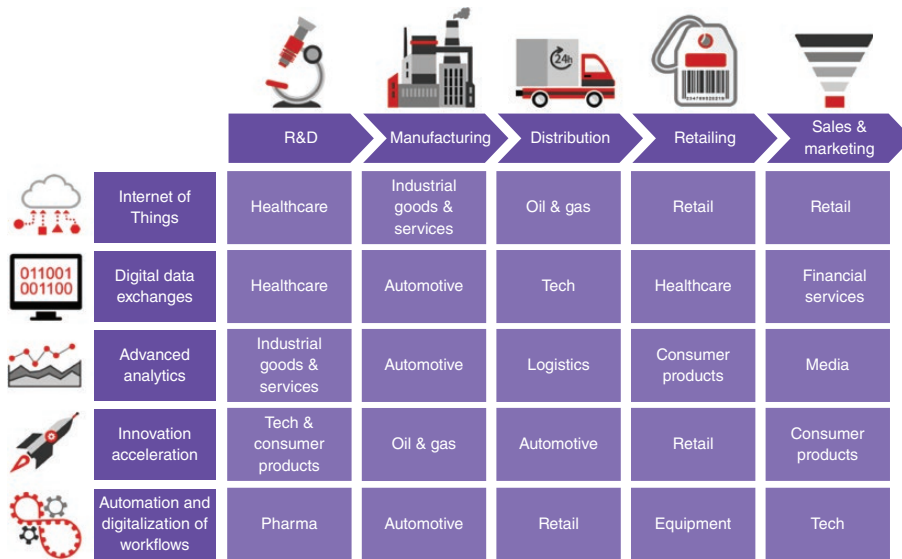


Figure 1.2 Application of digital disruption across industry sectors

Source: Bain & Company, 2015. www.bain.com/bainweb/media/interactive/disruption

DISCOVER MORE ON THE PAST AND FUTURE HISTORY OF THE INTERNET

Written by the who's who in internet development, 'The past and future history of the Internet', published in *Communications of the ACM*, provides great background information to the early impact of the internet and how it evolved (Leiner et al., 1997).

All digital disruption is driven by technology, especially as it becomes smaller, faster and easier to access. Examples of technology-driven digital disruption include:

- 1995: Amazon disrupted the traditional book-selling market
- 1997: Netflix disrupted the traditional video-hire market
- 2008: Airbnb disrupted the accommodation sector
- 2009: Uber disrupted taxi services

What is interesting to note is that some disruption takes years to gain scale. As an example, Amazon is heralded as the next new easy-to-use online supermarket, yet it has existed for over 20 years.

Activity 1.2 What's Your Digital Disrupter?

1. Thinking about one of your favourite brands, what innovations could disrupt and change how it works?
2. Describe and assess how disruption would bring benefits and differentiate the brand.

See Template online: Assessment of Disruption

1.5 INTERNET OF THINGS

The **Internet of Things (IoT)** (see Key Term) is one factor that has contributed to digital disruption. Understood as connectivity technologies where devices are joined up, the IoT ecosystem relies on sensors such as barcodes and RFID tags (radio-frequency identification) within a WiFi zone. From this it can identify physical properties such as: Are there people in the building? How is your health? Is your heart beating at the usual rate? What's the date on the barcode? What's the thermostat temperature? This is combined with autonomous machines being accessed via a remote control source such as an app on your phone or your wearable device.

Having identified the tags and what's happening means that we are more intelligently using the data. One commonplace example is a Satnav system that finds the fastest way to your destination, suggesting alternative routes to avoid congestion. Some Satnav systems have greater connectivity where marketing is involved, showing the nearest Starbucks, BP petrol station or McDonald's.

IoT has developed dramatically in healthcare and medical devices, such as pacemakers that can be adjusted while the patient is at home and the cardiac consultant is in their office. This does scare some people (what if it goes wrong?) and there have been rumours about issues with US presidents and their pacemakers being hacked!

In domestic situations we are already witnessing the start of how the IoT is developing, with devices like Google Home and Amazon Alexa that can connect to lighting, heating and security within the house. This means if you leave the house and can't remember if you left the lights on or not, you can check the app and switch off the lights. Equally if you're arriving back late, you can switch on the lights, the heating and the oven 10 minutes before you arrive home.

Based on a discussion group, Professor Peter Verhoef and many colleagues explored consumer connectivity and they created a framework for a consumer-centric IoT, as shown in Figure 1.3. This is a simplistic matrix approach where they have used two variables – ecosystems and interactions – and from this identified four business models.

In ecosystems they have noted the idea of open and closed systems. For business model (I), which is a closed system with utility, they used Amazon Echo as the example. It is closed as it is only available in a specific geographic area, it is linked to an individual or family account and it may be passcode protected.

Open networks are available to others, such as the smart meters which are shown in model (II). This means that instead of the requirement to stay at home when the

electricity, gas or water meter usage is checked and recorded by an engineer, this could happen remotely from the supplier's office. Model (II) facilitates better energy use as washing machines could be intelligently managed and switched on when there is less power usage on the grid, or timed to complete the wash cycle five minutes before the alarm clock goes off.

The group discussed levels of interaction between business and consumers. Business model (III) is a closed system for use by consumers. In this example, they used Nest, the technology company that enables consumers to connect devices and send commands remotely from an app to switch on the lights, measure the amount of heat, light and power used that month or check the security cameras.

Model (IV) explored consumers interacting with each other on a peer-to-peer basis. So if there is a day in your calendar when you are not using your car, one of your neighbours could rent or borrow it, and their example was Relay Rides, a firm that enables this functionality in the United States, similar to Airbnb, but for cars.

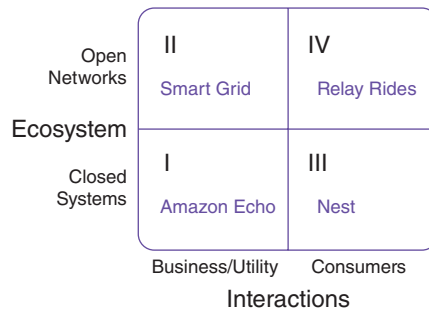


Figure 1.3 Consumer-centric IoT business models

Source: Verhoef et al., 2017, p. 5

It is an interesting model, which, in a utopian world, would work well, but there may be privacy concerns about sharing your calendar with your neighbours – do you want them to know when you're away or at home all day?

Amazon Echo had challenges when initially launched as children were making purchases via their parents' Amazon accounts. Amazon has solved this with the option to enter a passcode before confirming purchases. There are additional concerns about the devices being hacked so that snoopers can monitor your conversations. The difficulties ahead may be about the fear of use and potential misuse of systems, rather than the technology.

As the technology evolves and as we become more comfortable with its use and security improves, we could use the IoT in other ways, for example:

- Scanning food into the fridge, which will tell you what's needed for the menu that night before sell-by dates are reached – less food waste.

- Regular items automatically re-ordered as the supplies run low – better management of household goods.
- Changes in health or diet could trigger an automatic request for a medical check-up – proactive healthcare monitoring.

KEY TERM INTERNET OF THINGS (IOT)

In a background report from the Organisation for Economic Co-operation and Development (OECD) for a ministerial panel, the authors provided this definition:

IoT refers to an ecosystem in which applications and services are driven by data collected from devices that sense and interface with the physical world. In the Internet of Things, devices and objects have communication connectivity, either a direct connection to the internet or mediated through local or wide area networks. (Working Party on Communication Infrastructures and Services Policy, 2016, p. 9)

Another aspect of the IoT is the industrial internet of things (IIoT). This considers IoT on an industrial scale, where, within towns and cities, different elements are connected, such as traffic lights and pollution sensors, drains and surface water output, outdoor temperatures and heating systems. The typical aspects that contribute to the IIoT are focused on improving energy production, healthcare, manufacturing and logistics. This has become a recognised phenomenon and there is a dedicated Industrial Internet Consortium, founded by organisations including IBM, Intel, General Electric (GE) and other technology companies.

Part of the IIoT is the concept of Smart Cities, which have been described by Yasir Mehmood and his colleagues as a 'complex ecosystem characterized by the intensive use of information and communications technologies (ICT), aiming to make cities more attractive and more sustainable, and unique places for innovation and entrepreneurship' (Mehmood et al., 2017, p. 16).

The move towards the smart city concept is only possible with sensors, cameras and mobile devices collecting and sharing data, part of which revolves around **big data** (see Key Term). The issue is whether you, as a future citizen of big cities, are happy being tracked, monitored and shared through an ecosystem.

There is a dark side to the Internet of Things, which is well described by researchers David De Cremer, Bang Nguyen and Lyndon Simkin who highlighted potential abuses at different stages from transaction, gathering knowledge, the ongoing relationship and integrity. The main issues raised were (De Cremer et al., 2017, p. 150):

- Information misuse – abusing the data held about the customer
- Privacy issues – collecting health and personal fitness data and selling online
- Switching barriers – making it less attractive or difficult to switch providers
- Favouritism and discrimination – micro-segmentation based on shared customer behaviour

- Unfairness – discriminating against certain user types, such as higher prices to Mac users
- Dishonesty – cross-selling potentially unwanted or unneeded products based on behaviour
- Financial penalties – only benefiting clients wearing fitness devices and penalising those that won't
- Confusing customers – only providing complex pricing models

Activity 1.3 Create Your Internet of Things

1. In groups discuss what would help university life within the Internet of Things.
2. Consider what elements could be connected.
3. What benefits could this bring?
4. What concerns do you have about your Internet of Things?

1.6 BIG DATA

The Internet of Things groups together **big data** (see Key Term) from a range of different sources. This can be both positive and negative, as we have previously seen.

KEY TERM BIG DATA

Originally defined by two NASA researchers, Michael Cox and David Ellsworth, big data referred to large data sets that computers could barely handle (Cox and Ellsworth, 1997).

Some years later, in 2001, Doug Laney published an article about the benefits of central data warehousing due to big data. In the article he coined the concept of the 3V for big data: Volume, Velocity and Variety. This was a great way to describe all aspects of big data as the breadth and depth of data increased (volume), the speed of data (velocity) had increased and different types (variety) of structured and unstructured data appeared (Laney, 2001).

Health insurance companies know your age, job role, where you live, whether you drive far for work, your family composition, typical diet, height, weight, health problems and where you visit on holidays. Some companies are also offering free fitness trackers for cheaper insurance premiums, which allows them to assemble a full profile of your daily life.

Social media companies including Facebook, Twitter and Google gather big data. They have your personal profile details and can see your buying behaviour. This can be overlaid with additional data from third-party sources. This data is fed back to data specialists where the data is integrated, to better inform market research companies.

Two of the main professional data specialists are:

- CACI, whose database named 'Ocean' provides lifestyle and demographic details on 48 million adults in the UK.
- Nielsen, another major data specialist, which has amassed data on consumers in 47 countries.

These companies are invaluable resources when you are a busy marketing manager and want to target the right customers with the right message. As professional organisations, they abide by strict rules of conduct. However, there are less scrupulous firms selling data. Within five days of having my academic email address published on the university website, my data had been **scraped** (see Ethical Insights: Web Scraping) and sold on, which I realised as soon as I started receiving random emails from companies inviting me to attend health and safety conferences.

Ethical Insights Web Scraping

Web scraping or harvesting means taking data from websites without the owner's permission. It works by using web scraping software to visit websites, identify email addresses and add to a local database. The database is typically sold on as 'new data' and those making the purchase might think these companies have permission to sell the data!

Whilst web scraping is not technically illegal, using the data may be and often results in getting emails blocked and reported as spam.

The challenge with big data for consumers occurs when a company scrapes their data or uses their in-house data for other purposes, such as selling to third-party 'partner organisations' who advertise potentially unwanted products or adopt shady selling techniques.

1.7 PRIVACY AND THE RIGHT TO BE FORGOTTEN

There is specialist legislation, which is commonly referred to as 'the right to be forgotten', which enables individuals to remove unnecessary personal data from search engines.

Writing in the *Journal of Consumer Affairs*, researcher Kucuk Umit noted that collecting information that is 'inaccurate, inadequate, irrelevant or excessive' contravenes the individual's right to be forgotten (Kucuk, 2016, p. 522).

However, as this is based on European Union legislation (May 2014 Court of Justice ruling) it can only be applied within EU states, which means that the information may remain in other locations, such as the United States. To discover how the process works, explore the search engines' request forms for removal of content: Google <https://is.gd/righttobe> and Bing bing.com/webmaster/tools/eu-privacy-request.

Unsurprisingly, when a challenge occurs, solutions usually follow soon after. One solution, if you are unhappy with your online profile or if the search engines reject your request, is to gain third-party help to remove unwanted content, for a fee (see Digital Tool: Online reputation management).

Digital Tool Online Reputation Management

The right to be forgotten has created several new businesses, including online personal reputation management tools such as:

- <https://forget.me>

Other legislation across Europe (including the UK) concerning data and privacy is the **General Data Protection Regulation**, which was introduced in 2018 and has changed how data is managed (see Key Term).

KEY TERM GENERAL DATA PROTECTION REGULATION (GDPR)

The General Data Protection Regulation, abbreviated to GDPR, has introduced major changes in how data is managed. The Regulation means that organisations can only contact consumers if they have explicitly given consent, so if you have allowed a company to contact you about an online sale and they contact you about a totally different subject, the law is being broken. If organisations mis-manage the data and it is accidentally shared, leaked or hacked, the fines have increased dramatically. Maximum fines are 20 million euros or 4% of turnover, whichever is greater. This could result in smaller businesses ceasing to trade if their data is not properly secured and is shared.

You can find out more about the GDPR on these websites:

- DMA <https://dma.org.uk/gdpr>
- European Commission http://ec.europa.eu/justice/data-protection/index_en.htm

1.8 BITCOIN AND BLOCKCHAIN

In 2009 a new form of digital currency was introduced to the world, a cryptocurrency called Bitcoin. Created anonymously, it works on the basis of peer-to-peer financing. There are no banks, no third parties, no bank vaults, no cash machines involved with Bitcoin.

Bitcoins are stored in a digital wallet which is kept on your computer or stored in the cloud. You buy or sell Bitcoins on Bitcoin exchanges, such as Coinbase and Gemini Exchange. You can buy Bitcoins in any currency and transaction fees are smaller than standard currency exchange rates, which makes them popular for large overseas payments.

Transactions are recorded online in a transparent register which is called a blockchain and all transactions are checked electronically.

DISCOVER MORE ON BLOCKCHAIN

1. Visit the Blockchain support centre online: <https://support.blockchain.com>.
2. Read the *Harvard Business Review* article 'The truth about blockchain' (Iansiti and Lakhani, 2017).

New Bitcoins are created by mining and an industry of Bitcoin miners has developed. Bitcoin miners de-code online encrypted mathematical challenges using algorithmic processes. In exchange for their work in finding and recording Bitcoins on the blockchain, they are given Bitcoins. Becoming a Bitcoin miner requires hardware in the form of super-fast computing systems as well as software.

There are downsides to Bitcoin as the whole process is anonymous, giving rise to potential for money laundering as well as illegal or terrorist uses, and this has resulted in many mainstream banks refusing to accept Bitcoin or closing accounts trading in the currency.

Other downsides are that there are no guarantees if the coins are lost, and there have been many scams with all aspects of bitcoins, from hacked wallets to software scams.

See ONLINE RESOURCE: Comparison of traditional currency and Bitcoin

Case Example 1.2 The Lost Bitcoins

James Howells, a computer engineer, was tidying up his old computers and accidentally threw away a laptop containing 7500 Bitcoins in 2013, which was worth £750,000. Today it is more likely to be around £40 million!

He spilt a drink on the device and decided to leave it for collection and removal to the household waste recycling centre near Newport in Wales, only realising later that the hard drive contained his

digital wallet (McCormick, 2013). Howells visited the waste recycling centre only to discover that his computer, along with significant amounts of other waste, was buried deep under metres of items, somewhere in a space bigger than the size of a football pitch, and could not be recovered.

This case highlighted one of the vulnerabilities of bitcoins, that if stored on a device, there is no way to retrieve them other than via that device. Since this time many bitcoin owners have backed up their systems, just in case.

Case Questions

- Perhaps you don't own any Bitcoins, but how do you back up your data?
- Have you lost data when a Macbook or laptop has failed? If yes, how did you cope with the data loss?
- What might be the impact if your Macbook or laptop failed later today?

Whether Bitcoin has a future as a real alternative to traditional currency is debatable. Payment specialists Consult Hyperion think it is unlikely as people would need to be comfortable sharing all their transactions as well as needing to manage their own Bitcoin security (Consult Hyperion, 2015). The bank BNY Mellon also thinks it is unlikely, especially as countries including Iceland, Vietnam and China have banned the use of Bitcoins (BNY Mellon, 2015).

Whilst Bitcoin is the best known, there are alternatives, such as Ethereum, Litecoin, Ripple and many more. What Bitcoin has achieved is awareness of a new disruption digital currency.

1.8.1 BLOCKCHAIN – THE DISTRIBUTED LEDGER

One technological innovation generated through the development of Bitcoin was blockchain or distributed ledger technology (DLT). A blockchain is a distributed database so no one person or organisation stores all the data, it is securely shared over several systems, records all actions and is open for verification (Workie and Jain, 2017).

Blockchain was initially aimed at securely recording all Bitcoin transactions but its usefulness on a wider scale for 'interorganizational cooperation' was realised (Gupta, 2017, p. 3). There are experiments taking place at the moment to see how this type of **disintermediation** (see Key Term) can work. The benefits of the DLT are:

- One single person does not control all the data
- Data sets are portable
- Records are transparent
- Greater data integrity as records cannot be changed later
- More efficient system

There are opportunities to use blockchain technology for:

- **Medical records:** Every specialist, every appointment, diagnosis, treatment and prescription history could be viewed in one place. The doctor has the key; so too does the patient and can share where needed.
- **Education and training data:** All results, certificates, accreditations, memberships and awards are in one place. The individual has the key and can share with potential employers before interviews.
- **Property records:** A property passport could be established that lists all safety checks, mortgages attached to the property, equipment installed (and removed), planning permissions and ownership. The current owner has the encrypted digital key that is handed to new owners when needed.

As a company, Blockchain is promoting itself as ‘the world’s leading software platform for digital assets’ and has secured funding from major investors including Google’s Venture Capital company Lakestar and Sir Richard Branson (Blockchain, 2017, p. 1).

There are drawbacks to blockchain technology too: supercomputers use a lot of energy; some say as much as a small country! The database keeps growing and it is getting slower; if you make a mistake, it is there forever and can’t be changed. Once content is added, it can’t be corrected – whilst that has advantages, it is also a disadvantage. It is also complicated and will take time to be used routinely by many major companies.

KEY TERM DISINTERMEDIATION

Disintermediation is about removing the middle man or the intermediary. Researchers Manjit Yadav and Paul Pavlou suggested that disintermediation was ‘the elimination or significant curtailment of the role played by intermediaries’ (Yadav and Pavlou, 2014, p. 34).

FURTHER EXERCISES

1. Imagine you are working for an organisation with an older audience, mainly digital immigrants. Write 500 words explaining the key changes in traditional to digital marketing and what this means to them.
2. Create an outline plan to start a blog as an opinion leader. What tools or skills would be needed? What would be the subject area? What types of content would be included?

3. Analyse the Internet of Things in your environment, whether at home, work or university. How are these items connected or how could they be connected?

SUMMARY

This chapter has explored:

- The critical factors in the digital marketing landscape from ubiquitous computing to micro-influencers.
- Why the move from traditional to digital marketing tools has occurred and the difference between digital natives and digital immigrants.
- How digital disruption can change market sectors.
- Ways that the Internet of Things can be applied to consumers.
- How privacy and data need to be carefully managed in a marketing environment.
- The future potential of blockchain within business.

2

THE DIGITAL CONSUMER

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** consumerism and hedonic consumption
- Apply** the Technology Acceptance Model
- Analyse** the digital customer experience
- Evaluate** consumer power
- Create** a customer journey

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Construct an online customer journey
- Analyse the digital customer experience
- Create a service blueprint

2.1 INTRODUCTION

In this chapter we will explore how digital marketing has introduced a whole new era for the consumer. We can browse, compare, share and shop online. From owning to renting, it's all about delivering a successful customer journey.

We all study consumers – psychologists, sociologists, anthropologists, economists and other experts. People-watching is a key part of consumer research: whether people decide to buy or not to buy, how they choose, use and dispose.

2.2 THE EVOLUTION OF THE DIGITAL CONSUMER

We have moved from a time where companies made as many products as they could and sold as many as possible in the mass production era, when there were few options for shopping other than local stores. We are now in an era where we can access any goods from any place at any time and often on any device. There is an emergent culture of sharing what we have; from cars, to parking spaces, from spare rooms to food. Plus we are more accepting of technology and see the usefulness it contributes to our lives. So who or what is the digital consumer?

Let's start with a definition of consumer from the Oxford English Dictionary (Oxford Dictionary, 2017a):

- 'A person who purchases goods and services for personal use.'
- 'A person or thing that eats or uses something.'

That's fairly straightforward. We all buy things and use them. At one level I'm a consumer of salads and cappuccinos, at another I'm a keen consumer of handbags. The salads and coffee are essential purchases to fulfil a need of not being hungry or thirsty or tired. And the handbags. I don't actually need any more bags. Each year I say I won't buy any more, but that year hasn't quite happened. The handbags are fun, make me smile and the whole process of selection and purchase is hedonic. So, I am a **hedonic consumer** (see Key Term).

DISCOVER MORE ON CONSUMERISM

For a full history of consumerism, Steven Miles (1998) has a useful book: *Consumerism – As a Way of Life*.

In the *Journal of Consumer Culture*, George Ritzer and Nathan Jurgenson (2010) wrote 'Production, consumption, prosumption', which also described the evolution of these phenomena.

There are many excellent journals relating to consumers which you can explore online via your university library system, including: *Journal of Consumer Behaviour*, *Journal of Consumer Culture*, *Journal of Consumer Marketing*, *Journal of Consumer Psychology*, and *Journal of Consumer Research*.

But the handbags offer a **utilitarian** benefit too (see Key Term). They store stuff. I have different bags for different events with specific utilitarian benefits. If it's a train journey, I take a bag with a cross-body strap as it's less hassle getting on and off trains. If it's a plane journey, I take a bag with a strong zip so everything doesn't fall out at the security checks. If it's a day at the university, I take a big open bag to hold the water bottle, books and other student paraphernalia. These functional attributes are utilitarian benefits whereas the amazing handbag shape, the designer, the colour and the materials are all hedonic benefits.

KEY TERMS HEDONIC AND UTILITARIAN CONSUMPTION

The Greek goddess Hedone represented pleasure and enjoyment and is the origin of the word hedonism. Describing consumption as hedonic indicates that it provides delight. Hedonic consumption is largely credited with having been placed on the marketing research agenda by Elizabeth Hirschman and Morris Holbrook:

Hedonic consumption designates those facets of consumer behavior that relate to the multi-sensory, fantasy, and emotive aspects of one's experience with products. (Hirschman and Holbrook, 1982, p. 92)

A hedonic consumer is thus a consumer who gains happiness from acquisition!

Utilitarian benefits have been described as the functional, instrumental and practical attributes of the item (Chitturi et al., 2008).

For more on hedonic and utilitarian consumption see: 'Pleasure principles: A review of research on hedonic consumption' by Joseph Alba and Elanor Williams in the *Journal of Consumer Psychology* (Alba and Williams, 2013).

Michel Pham discussed consumer psychology, mainly concerning the way the research has become detached from practice. He illustrated the scope of consumer behaviour as being framed between consumer experience and consumer learning, which is shown in Figure 2.1.

If we apply this in a digital context we might consider an online-only product, such as online storage space. We are in an environment where we write reports, create presentations, store images and collect content. All these online documents require storage. You could store your documents on a PC, but the challenge is that you may use different PCs or laptops – at home, at the university and in libraries. And what happens if your main laptop breaks or gets stolen? That would mean your work was lost too.

Thinking about the potential for things to go wrong, it is easier to rent some space in the cloud.

The concept of 'the cloud' means we can access our materials at any time from a remote or virtual computer, which enables **ubiquitous computing** (see Key Term, p. 4).

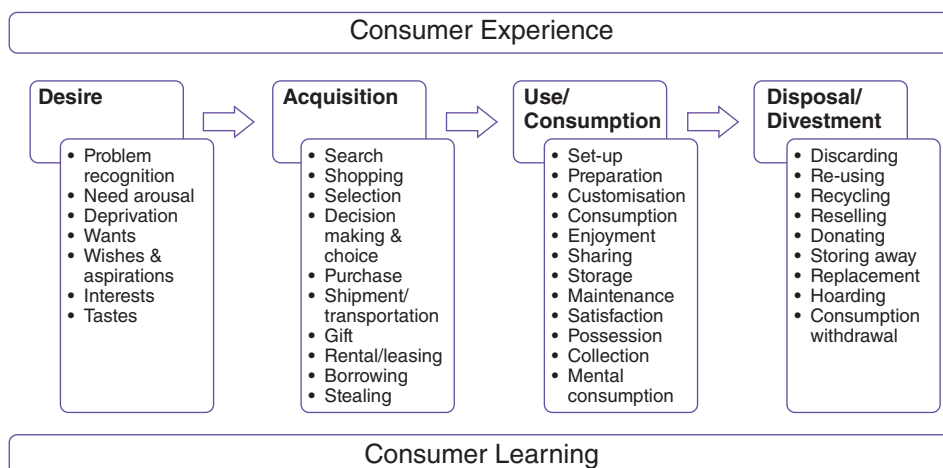


Figure 2.1 The scope of consumer behaviour

Source: Pham, 2013, p. 414

Cloud storage options have expanded in recent years. Many people started with a small amount of space in Dropbox that they rent with a free account. This is free-renting.

Dropbox's aim was that as your storage needs increase, because you might hoard documents, rather than sorting out and deleting older copies, you will need to upgrade to a paid-for plan. In this example, you never own the product, you simply rent, paying either a monthly or annual rental charge.

This is an example of utilitarian consumption. You may not feel delighted subscribing to Dropbox, but it is useful for online storage. Dropbox is trying to transform this into a hedonic purchase with the idea of 'gifting' storage to a friend. I don't know about your friends, but mine would consider it odd if I gifted them online storage space!

There are alternatives to cloud storage. You could use external hard drives or USB sticks. These could present the same issues as a hard drive. The Macbook or laptop could freeze, may need to be completely re-set (return to factory settings) and I could still lose the data.

KEY TERM DEMATERIALISATION

The one area of material consumption that has completely transformed, from a traditional acquisition of artefacts to digital consumption, is music. There was a time when people owned vinyl records, then cassette tapes or CDs, whereas today very many of us don't physically own any music; we rent all the playlists we want via a monthly Spotify, Amazon or iTunes music account.

This can be described as 'dematerialisation', where we stop purchasing and owning material items and instead rent or share (for more on digital music consumption, see Magaudda, 2016).

Imagine if that was a whole semester's worth of work ...

Other competitors to Dropbox are likely to be available to you right now. Your university might offer OneDrive storage, Google offers Drive and Apple offers iCloud. It's all free storage space until you need more and it's all online and accessible anywhere at any time.

The digital environment has provided consumers with access to more choice and customer acquisition has changed, as shown in Table 2.1.

Table 2.1 Differences in customer acquisition for traditional and digital consumers

Acquisition steps	Traditional consumer	Digital consumer
Search	High street or shopping mall, items in magazines	We search online for products We explore products our friends recommend on social media
Shopping	Physical visits to stores	We use branded websites and comparison websites to shop online We use store apps for instant shopping
Selection	See products closely and decide whether to buy	We compare delivery times, costs, overall costs We check reviews and ratings
Decision making and choice	Decision making with fixed store times	Based on ratings and ease of purchase we decide and choose We save items for later with 'wish lists'
Purchase	Involves queuing to pay	One-click delivery systems, next day delivery, delivery to lockers
Gift	Requires additional effort to take away, wrap, pack and post	Automatic gift options and reminders, purchase from one address and delivery to another address
Rental	Physically visit a store to organise a rental agreement	We rent music, properties, cars and more, at the click of a mouse

2.2.1 ACCEPTING NEW TECHNOLOGY

These changes in behaviour show our acceptance of technology, and back in 1989 this was a major challenge. This was at a time when computers were being introduced into the workplace, where there were difficulties in comprehending the benefit of these devices. Your grandmother might have used a typewriter or even a telex machine. Suddenly computers started to be introduced.

Businesses were having difficulty persuading companies to adopt this new technology and Fred Davis, a researcher at the University of Michigan in the United States, was exploring ways to predict system usage by testing the adoption of new technology based on positive attitudes towards the perceived client benefit and the user experience. His measurement framework is called the Technology Acceptance Model (TAM) (Davis, 1989) and it is shown in Figure 2.2.

TAM was originally designed to 'explain computer usage behaviour' (Davis et al., 1989, p. 987), although more recently it has been adapted to measure the adoption of new

technology. The model considers positive attitudes towards two specific measures: (a) perceived usefulness; and (b) perceived ease of use.

The origins of TAM can be found in the 'Theory of Reasoned Action' (see Chapter 10, Building the Digital Marketing Plan), developed by Ajzen and Fishbein (1980). Davis used this as the initial concept but wanted an easier model that could be applied in the workplace. This feature is also one of the major criticisms of this model – its simplicity, as it is seen as being too basic. TAM has been used by many researchers in digital marketing who have added elements to make it more complicated and more relevant to today's environment. However, TAM is still recognised as a leading model in explaining users' behaviour towards technology and the original model continues to be used and widely understood.

People accept or reject different technologies and Davis' research explained that people will use an application that they feel will help them perform their job better. This was named 'Perceived Usefulness' and was originally suggested by other researchers.

At the same time, Davis stated, if the application is too difficult to use, the benefits may be outweighed by the effort of using the application. This was called 'Perceived Ease of Use'. Davis explained that a TAM should discover the impact of external factors; and so the model starts with the external variables which could include items such as individual or group training and user guides. The flow of the model is shown in Figure 2.2 and this initial framing from the external variables contributes towards the perceptions of usefulness and ease of use, which in turn lead towards the attitude toward using the system. Finally, positive attitudes contribute to a behavioural intention to use the system.

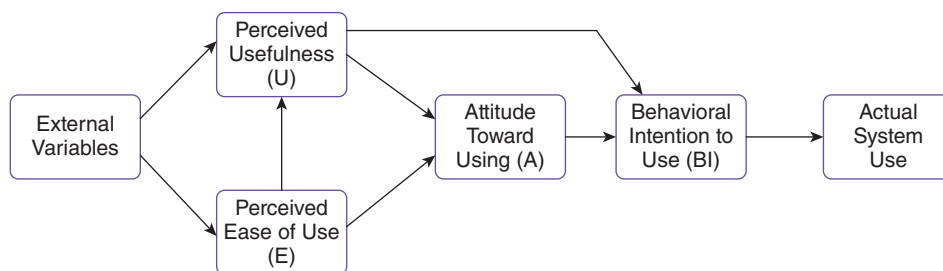


Figure 2.2 Technology Acceptance Model (TAM)

Source: Davis, Bagozzi and Warshaw, 1989

The different constructs are measured through a series of questions to identify the advantages, disadvantages and any factors associated with using the technology. It requires some statistical input to take the model through to the final conclusion.

In his 1989 research Davis explored electronic mail (or email) and he asked 14 questions to assess the Perceived Usefulness and Perceived Ease of Use at a time when it was more usual to use traditional mail. These are shown in Table 2.2 and I have added bold type to the words electronic mail to indicate how these could be replaced with another type of technology such as augmented reality, personal drones or specific apps.

Thinking back to when Davis developed this model, many people were concerned that computers would take away their jobs. The concern about email was that it could replace the need for some letters and that people would not need secretaries any more. This is partly true and what has really happened is that we have ended up with a greater amount of communication instead of less and we have all developed secretarial skills – typing correspondence, booking diary appointments and managing our contacts.

The issue is the fear of the unknown. We are witnessing this with the idea of robots taking away other jobs. What is likely to happen is that robots will perform mundane, repetitive tasks and employees in these roles will gain training to focus on other tasks.

Table 2.2 Initial scale items for Perceived Usefulness and for Perceived Ease of Use

Initial scale items for Perceived Usefulness	Initial scale items for Perceived Ease of Use
1. My job would be difficult to perform without electronic mail.	1. I often become confused when I use the electronic mail system.
2. Using electronic mail gives me greater control over my work.	2. I make errors frequently when using electronic mail.
3. Using electronic mail improves my job performance.	3. Interacting with the electronic mail system is often frustrating.
4. The electronic mail system addresses my job-related needs.	4. I need to consult the user manual often when using electronic mail.
5. Using electronic mail saves me time.	5. Interacting with the electronic mail system requires a lot of my mental effort.
6. Electronic mail enables me to accomplish tasks more quickly.	6. I find it easy to recover from errors encountered while using electronic mail.
7. Electronic mail supports critical aspects of my job.	7. The electronic mail system is rigid and inflexible to interact with.
8. Using electronic mail allows me to accomplish more work than would otherwise be possible.	8. I find it easy to get the electronic mail system to do what I want it to do.
9. Using electronic mail reduces the time I spend on unproductive activities.	9. The electronic mail system often behaves in unexpected ways.
10. Using electronic mail enhances my effectiveness on the job.	10. I find it cumbersome to use the electronic mail system.
11. Using electronic mail improves the quality of the work I do.	11. My interaction with the electronic mail system is easy for me to understand.
12. Using electronic mail increases my productivity.	12. It is easy for me to remember how to perform tasks using the electronic mail system.
13. Using electronic mail makes it easier to do my job.	13. The electronic mail system provides helpful guidance in performing tasks.
14. Overall, I find the electronic mail system useful in my job.	14. Overall, I find the electronic mail system easy to use.

Source: Davis, 1989

In both cases, respondents rate the scale items which are subsequently ranked on a 'highly likely' to 'highly unlikely' scale, to deliver a statistically recognised measure. The numerical analysis is great if you have access to statistical packages (and know

how to use them!) and if not, the model can be adapted and the questions used in a survey format.

The Technology Acceptance Model is a good foundation to test the development of new apps as it enables companies to create more useful and easier to use systems. TAM was an antecedent of measuring user experience and the questions applied in the original study are still valid today although they require some adaptation.

Activity 2.1 Application of the Technology Acceptance Model

1. Think of a technology, an app or a device that has failed.
2. In Table 2.2 replace electronic mail with your selected technology.
3. Use the questions in Table 2.2 and score the items using a 5-point scale with 'highly likely', 'likely', 'neither likely nor unlikely', 'unlikely' and 'highly unlikely'.
4. Analyse the factors: what is the overall perceived usefulness? And the perceived ease of use?
5. Which specific factors do you feel contributed to the failure of the technology, app or device?
6. Discuss with classmates.

2.3 CHANGING DIGITAL BEHAVIOUR

Whilst we are more accepting of technology there have been other behaviours that have evolved within a digital environment, including:

- Consumer power
- The rise of the prosumer
- Second screening
- Showrooming and webrooming
- Liquid consumption

These are discussed in the following parts.

2.3.1 CONSUMER POWER

The power has moved from company to consumer and we have seen an increase in consumer power. Gillian Naylor, writing in the aptly named *Journal of Consumer Satisfaction, Dissatisfaction and Complaining Behavior*, created a typology of consumer communication in the digital age, shown in Figure 2.3. Its central focus is

how communications have moved from business to consumer (B2C) to consumer to business (C2B) and consumer to consumer (C2C).

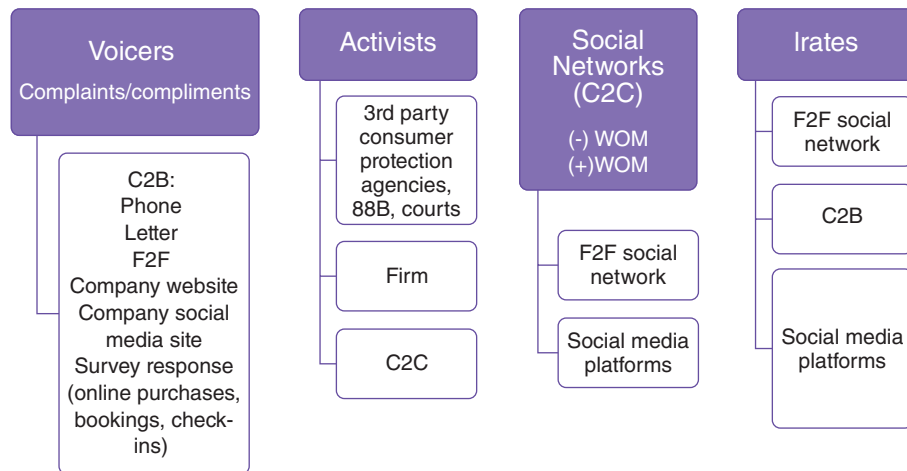


Figure 2.3 Typology of consumer communication (C2B/C2C) in the digital age

Source: Naylor, 2017, p. 134

Naylor commented how 'C2B and C2C Marketing communication is increasingly played out in other media and in view of others' (Naylor, 2017, p. 131). These shared sentiments have given rise to different types of consumer power and she categorised four types of consumer communications: voicers, activists, social networks (including C2C) and irates.

Voicers can share opinions more easily via social media, instead of a binary consumer to business route. Whilst activists can still seek redress from the courts for specific remedies, their messages can be shared using hashtags and the cost of the legal fees could be crowdfunding. Early social networks were considered by Naylor as friends and family – we are not talking about Facebook here! So, in a pre-digital age, stories were shared with co-workers, colleagues and other personal face-to-face networks (F2F). Social media facilitated this content to be imparted to a wider audience online. This model also considers word of mouth (WoM), from a positive and negative perspective.

The final group in Figure 2.3, irates, may have previously taken forms of direct action to gain attention and ensure their point of view was heard. For example, students could have marched, protested and organised demos to complain about specific issues. Does this still occur or have social media campaigns become the new normal?

Naylor further described different types of communication methods such as phone, letter, face-to-face (F2F), company website, social media and via third parties, and within this the concept of user-generated content, noted as a way for consumers to communicate and engage with brands. Chapter 4 considers the area of **user-generated content** (see Key Term, p. 115) in more depth.

2.3.2 THE RISE OF THE PROSUMER

American futurologist Alvin Toffler is largely credited with creating the term ‘prosumer’ in his 1980 book *The Third Wave: The Classic Study of Tomorrow* (Toffler, 1980). He combined the words ‘producer’ and ‘consumer’ to form ‘prosumer’, as consumers had become producers of goods and services. There are many examples of this, such as Wikipedia where individuals both add and consume content on the site. This is one of the many reasons it contains errors – you or I can add content that may or may not be accurate, true or relevant.

Other examples are user-generated content (see Chapter 4), where consumers post images of products purchased, producing free advertising material for companies.

Case Example 2.1 Open Source and the Prosumer

Most software sales models are based on a licence being sold. If you want to access Microsoft Office or Adobe Photoshop, you need to buy a licence. You are a consumer, you pay your money and access the product.

The opposite to this model is the Open Source movement, which advocates the development of software ‘that can be freely used, changed, and shared (in modified or unmodified form) by anyone’ (Opensource.org, n.d., p. 1). The developers create and share free software and the rules state that when you download it, if you adapt it to incorporate additional features you re-share it across the Open Source platform. The software is still accessed by a licence, so you can be advised of updates. This online community is self-managed and self-regulated so no one truly owns the software.

There are many competitors to Microsoft’s Office packages, including: Apache OpenOffice, LibreOffice and NeoOffice. These packages may not have the full functionality of a full MS Office suite, but most users only take advantage of a small percentage of the tools and they are popular with many businesses.

2.3.3 SECOND SCREENING

Second screening is also referred to as dual screening, media meshing, sofalising or connecting media.

The concept is about watching a TV screen (or a programme via Netflix on your laptop), whilst Facebooking friends on your mobile and using a tablet to search for content mentioned on TV. This enables consumers to watch a programme whilst searching for additional content about the programme and communicating their feelings about the programme to friends – simultaneously.

DISCOVER MORE ON SECOND SCREENING

See the paper ‘Who is on your sofa?’ by Doughty, Rowland and Lawson (2012).

2.3.4 SHOWROOMING AND WEBROOMING

The concepts of showrooming and webrooming first emerged in the practitioner sphere and it took a while for academics to start exploring these ideas. This was probably because the impact was greater in retail stores.

Showrooming involves searching in store and buying online:

Shoppers now frequently search for information in the store and simultaneously search on their mobile device to get more information about offers and may find more attractive prices. (Verhoef et al., 2015, p. 175)

Webrooming involves searching online and buying in store:

The opposite of showrooming also occurs, which is now referred to as webrooming, where shoppers seek information online and buy offline. In the past, this was found to be a dominant form of research shopping. (Verhoef et al., 2015, p. 175)

2.3.5 LIQUID AND SOLID CONSUMPTION

A new concept of **liquid consumption** versus **solid consumption** has emerged, championed and defined by Professors Fleura Bardhi and Giana Eckhardt (see Key Terms).

KEY TERMS LIQUID AND SOLID CONSUMPTION

Liquid consumption: 'ephemeral, access based, and dematerialized'

Solid consumption: 'that which is enduring, ownership based, and tangible'

(Bardhi and Eckhardt, 2017, p. 582)

This is a step change, as previously consumption was simply consumption. Bardhi and Eckhardt argued that the change has partly occurred with the increase in the digital economy and that consumers, in some cases, place greater dependence on digital access than physical ownership. Bardhi and Eckhardt also suggested that liquidity is not to be celebrated and may be as a result of income, life situation and the ability to move on quickly. Whilst this is a concept and has not been fully researched, one area to consider is lifestages. Do people move towards fluidity as they age and start to downsize and de-clutter? Is it only about lifestage or also point of view?

One other issue is digital clutter. It's great adopting a fluid perspective, but how many photos have you stored on Facebook? How many emails have you archived? As it is easier to retain liquid possessions, do we ever review and remove, as we would do with old clothing? What will happen to charity shops that feature heavily across the UK high street if a generation moves towards liquid possessions? These shops, from

Cancer Research to animal charities, depend upon the acquisition of solid possessions. This is certainly an area that requires more research.

Students often move between solid and liquid consumption. Some bring a carload of possessions to university whereas others travel light, often due to necessity, with a laptop, mobile phone and clothes. Those towards the fluid end of the scale can access music and films online and their contacts and memories are stored in their mobile phone.

DISCOVER MORE ON LIQUID CONSUMPTION

A good starting place is an academic paper entitled 'Liquid consumption' by Professors Fleura Bardhi and Giana Eckhardt (2017), published in the Journal of Consumer Research.

2.4 ONLINE CUSTOMER JOURNEY

The online customer journey is the process customers take from searching for an item to concluding with a purchase. This occurs offline as well as online and it is usually considered as a linear process. According to Katherine Lemon and Peter Verhoef (2016), this is in three stages, as discussed here:

- Stage 1 – Pre-purchase, where customers interact with the brand. There is problem recognition, search and consideration which could include a login to LinkedIn to check out a sales associate or the managing director or a look at the company Facebook page to see what feedback is shared, or perhaps online searches on review sites.
- Stage 2 – Purchase, which concerns all customer interactions during the purchase: the online user experience, ease of purchase, delivery choices and confirmation of delivery if relevant.
- Stage 3 – Post-purchase, which, according to Lemon and Peter Verhoef, comprises behaviours such as usage and consumption – you bought it but did you use it? Did you leave a review? Sign up for the newsletter? Share the purchase with friends?

Activity 2.2 Construct a Simple Customer Journey

Assess your activity as an online customer. Consider a recent purchase and list your pre-purchase, purchase and post-purchase stages.

See Template online: Assess the customer journey fundamental stages

2.4.1 THE CHALLENGE OF TERMINOLOGY

But there are challenges! One of these is the terminology, because the customer journey and the process of understanding the steps that customers take to complete an action is described in different ways:

- Buyer journey
- Consumer journey
- Consumer decision journey
- Customer journey mapping
- User journey mapping
- Customer service encounter
- Customer experience (CX)
- Online customer service experience (OCSE)
- Path to purchase
- Service blueprinting

If you fast-forward to Chapter 9, Strategy and Objectives, you will see where I discuss the McKinsey strategic model of the ‘consumer decision journey’; here I will explore the differences and origins of these different terms.

Buyer journey

The buyer journey was one of the earliest phrases used, but considered the consumer only as a buyer. We may primarily think of a customer journey as a visit to a website to buy a product but, in some cases, no purchase is made because a customer journey can be:

- Downloading a brochure
- Signing up for a newsletter
- Filling in a form
- Submitting information
- Registering interest or support

Buyer journey is more often used in commercial organisations where the goal is simply a purchase.

Consumer journey or consumer decision journey

The consumer journey or consumer decision journey was identified by the McKinsey team, who developed a strategic model from the initial consideration set to the post-purchase experience, moving away from traditional linear sales funnels (see Chapter 9).

Customer or user journey mapping

Customer or user journey mapping is generally acknowledged to have been devised by Barry Kibel in a book chapter where he suggested that results mapping could be used as an approach for assessing the work of social, health and education programmes.

The process was to map, score, analyse and provide feedback about a programme and the key factor was using a visual representation of the journey or process.

The journey starts with sharing the company name, through to registering for a newsletter. This could be the journey that a student takes when checking out a firm for a placement. In this example there are 12 steps, but they are linear. There can often be many more, which include moving forwards and backwards in a messy and less ordered way.

When discussing customer journeys David Norton and Joseph Pine described them as ‘the sequence of events – whether designed or not – that customers go through to learn about, purchase and interact with company offerings – including commodities, goods, services or experiences’ (Norton and Pine, 2013, p. 12). The key here is the concept of a sequence of events, regardless of whether the customer journey is online, offline or multi-channel.

Customer service encounters

Customer service encounters were reviewed by Clay Voorhees and many of his colleagues, where they were keen to define the area in more detail (Voorhees et al., 2016). Voorhees suggested that the difference between service encounter and service experience was about the period of time the service lasted. An ongoing or continuous service was an experience, whereas a specific service was an encounter. The encounters were divided into three phases:

1. Pre-core service encounter – the time before the main service where the customer engages with the firm and seeks information such as online reviews.
2. Core service encounter – the time at which the primary service is provided.
3. Post-core service encounter – the time after the service has been received where the consumer reflects, assesses the service and may complete online feedback.

This definition is especially helpful for non-profit firms or government bodies, where the aim is to gain information, submit forms or register details. The difference is the idea of the service encounter rather than a sale.

However, this approach is similar to the customer journey described by Lemon and Verhoef: there are three stages – before, during and after. Both are relatively simplistic and linear models, although they work and are easy to apply, so are useful places to start.

Customer experience (CX)

Customer experience (CX) has been studied by many scholars and there is no agreement on what it means. It was defined by Chiara Gentile and colleagues, writing in

the *European Management Journal*, as ‘an evolution of the concept of relationship between the company and the customer’ (Gentile et al., 2007, p. 397) and in the same year, Christoph Meyer and Andre Schwager wrote in the *Harvard Business Review* that customer experience ‘encompasses every aspect of a company’s offering – the quality of customer care, of course, but also advertising, packaging, product and service features, ease of use, and reliability’ (Meyer and Schwager, 2007, p. 118). Gentile and her colleagues adopted a view of the customer relationship whereas Meyer and Schwager took a pragmatic view of the whole product offer. Both definitions explain customer service, from different standpoints.

Meyer and Schwager proposed differences between customer relationship and experience management and I have adapted their content, shown in Table 2.3, to focus on the key factors they identified in customer experience management, as this provides a good summary of key factors in customer experience.

Table 2.3 Customer experience management

What	Captures and distributes what a customer thinks about a company
When	At points of customer interaction: ‘touch points’
How monitored	Surveys, targeted studies, observational studies, ‘voice of customer’ research
Who uses the information	Business or functional leaders, in order to create fulfillable expectations and better experiences with products and services
Relevance to future performance	Locates places to add offerings in the gaps between expectations and experience

Source: Adapted from Meyer and Schwager, 2007

The work by Katherine Lemon and Peter Verhoef around the online customer journey took place nearly a decade after Meyer and Schwager’s research. Lemon and Verhoef were keen to build a picture of the body of knowledge in this area and investigated earlier research into customer experience, summing up various definitions as ‘a multi-dimensional construct that involves cognitive, emotional, behavioral, sensorial, and social components’ (Lemon and Verhoef, 2016, p. 70). The concept of a ‘multi-dimensional construct’ covers many bases and ensures that the relationship and the product offer are combined.

Lemon and Verhoef provided a useful summary to explain what the research to date had explained about the different topics within customer experience, and this is reproduced in Table 2.4.

Table 2.4 What we know about customer experience

Topic	What we know
Customer experience dynamics	<ul style="list-style-type: none"> • The customer’s dynamic external environment can have a significant influence on customer experience • Extreme crises can have a strong, negative and enduring effect on the customer experience • The economic situation (i.e. recession, expansion) influences the customer experience across firms, and the drivers of customer experience may depend on the economic situation

Topic	What we know
Mapping the customer journey	<ul style="list-style-type: none"> • Service blueprinting can provide a solid starting point for customer journey mapping • Customer journey analysis should understand and map the journey from the customer perspective and, therefore, requires customer input into the process
The multichannel journey	<ul style="list-style-type: none"> • Channels differ in benefits and costs, often making one channel more useful for a specific stage in the purchase funnel than other channels. These differences are, however, shrinking due to technological developments and diffusion of new channels • Customers differ in their preferences and usages of channels across different purchase phases, and specific multichannel segments can be identified that differ in terms of consumer characteristics • Channel choices in the purchase funnel affect one another because of lock-in effects, channel inertia and cross-channel synergies
The multidevice and mobile journey	<ul style="list-style-type: none"> • Mobile device channels interact and may interfere with existing channels • Mobile device channels offer new location-based, time-sensitive opportunities to create firm-initiated touch points • Mobile channels appear to be better suited for search than for purchase • Mobile devices' direct-touch interface appears to significantly influence the customer journey
Customer experience measurement	<ul style="list-style-type: none"> • There is not yet agreement on robust measurement approaches to evaluate all aspects of customer experience across the customer journey; long-tested approaches (e.g. SERVQUAL) may offer a good starting point • Customer satisfaction and NPS perform equally well in predicting firm performance and customer behaviour • Transformations of metrics to account for potential nonlinear effects due to theoretical notions, such as customer delight, are useful • Customer feedback metrics focusing on a specific domain of the customer experience (i.e. Customer Effort Score) are not strong in predicting future performance • Multiple customer feedback metrics predict customer behaviour better than a single metric
Effects of touch points	<ul style="list-style-type: none"> • When moving through the customer journey to purchase, customers use and are exposed to multiple touch points that each have direct and more indirect effects on purchase and other customer behaviours • Although it is a complex and difficult endeavour, it is important to identify critical touch points ('moments of truth') throughout the customer journey that have the most significant influence on key customer outcomes
Customer journey and experience design	<ul style="list-style-type: none"> • A seamless experience across channels through channel integration will create a stronger customer experience • The effect of an individual touch point may depend on when it occurs in the overall customer journey
Partner and network management	<ul style="list-style-type: none"> • When mapping and analysing the customer journey, it is critical to take the broader service delivery system into account
Internal firm perspective	<ul style="list-style-type: none"> • The benefit to the firm of taking a stronger role in the service delivery network is to reduce uncertainty in customer experience delivery; this needs to be balanced against the increase in costs and complexities associated with such an expanded role • As partner networks become more ubiquitous, choosing appropriate governance models will be critical

Source: Lemon and Verhoef, 2016, p. 86, *Journal of Marketing*

Lemon and Verhoef mentioned three terms in Table 2.4 concerning customer experience which may need more clarification:

- **SERVQUAL** – a model for measuring service quality (see Parasuraman et al., 1985).

- **NPS** – Net Promoter Score, which is a single-question survey asking customers how likely they are to recommend the product or service, on a scale of 1 to 10. The percentage of all scores of 1 to 6 is subtracted from the percentage of 9s and 10s; 7s and 8s are discarded to provide a single score (largely credited to Reichheld, 2003).
- **Moments of truth** – all points of customer interaction (largely credited to Carlzon, 1987).

See Template online: Analyse the customer experience

Online customer service experience (OCSE)

Online customer service experience (OCSE) is a newer concept, and writing in the *Journal of Services Marketing*, Philipp Klaus from the ESCE International Business School in Paris, created a conceptual model of online customer service experience which was based on customers' experiences with the online bookseller Amazon.com (Klaus, 2013). His research identified 28 attributes, which were split into two main areas – psychological factors and functionality, and these were supported by sub-dimensions.

The psychological factors included trust, value for money and context familiarity (how close the experience is to an offline model).

The functionality elements are a useful checklist for overall website usability: ease of use; communication; social presence; product presence (product images and descriptions such as 'look inside'); and interactivity.

The model is shown in Figure 2.4 and it may be that you think that this does not include any surprises. However, it is the combination of the two areas that leads to a better customer experience, which is similar to the initial descriptions discussed earlier in this chapter, provided by Gentile and colleagues, who considered the psychological factors, and it could be argued that Meyer and Schwager's definition of customer experience focused on the functionality aspect.

The OCSE model is another useful model for assessing the customer service experience and could be adapted as a checklist for business.

Path to purchase

Borrowed from computing terms, path data contains information about a user's search behaviour, interests and visits. In marketing parlance, the 'path to purchase' concept is similar to a non-linear customer journey; the difference is trying to attribute the elements or touch-points which have had an impact on the journey. Was it the email? The pop-up offer on the website? Perhaps **dark social** (see Key Term) with a message from a friend? If the specific steps can be correctly attributed this means that greater investment can be made where needed.

Google, as a major seller of online advertising, was an early pioneer of sharing path to purchase data and provides free access to aggregate data, to inform marketers about latest trends and insights.

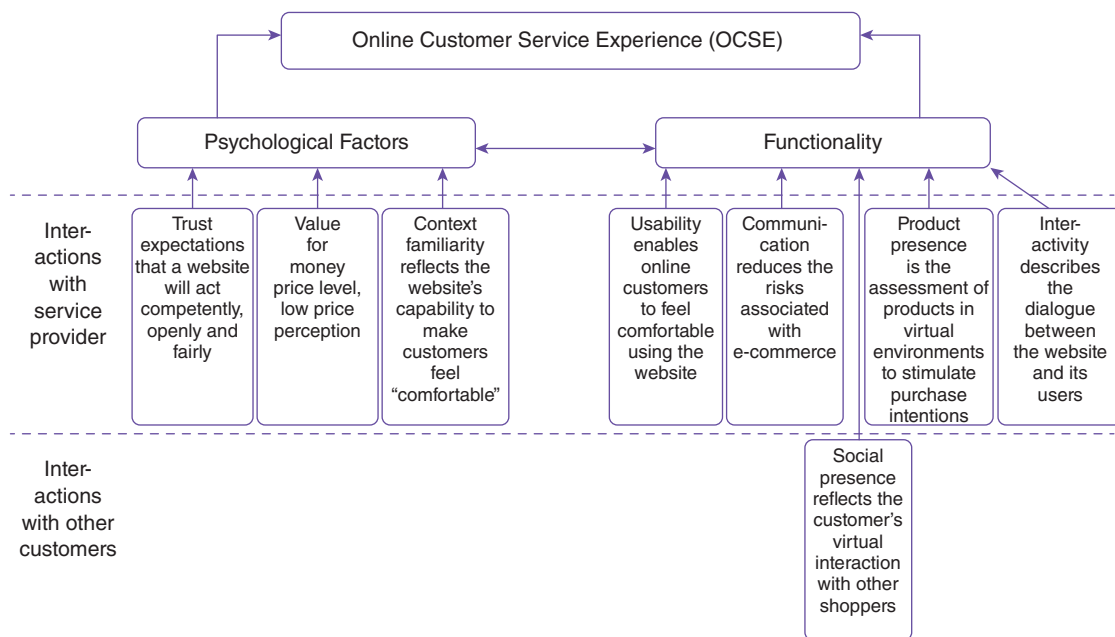


Figure 2.4 Online customer service experience (OCSE) conceptual model

Source: Klaus, 2013, p. 447

Digital Tool Google Path to Purchase

Google shares its aggregate data to inform marketers about shopping insights, trends and benchmarks. To further explore shopping insights, go to:

- thinkwithgoogle.com/tools

Other academic researchers, Alice Li and P.K. Kannan, created a conceptual framework for the path to purchase which combined the customer journey with stages initiated by the firm to influence and direct the purchase (Li and Kannan, 2013). They reviewed the channels connected to online purchases of high-involvement goods such as consumer durables and travel services.

They used a linear model from the channels considered, which were identified through search, so in the example of trying to find a flight, the consumer might search online for flights and they may visit a firm's own website, such as American Airlines or British Airways, or they may use a flight search engine such as SkyScanner. If the consumer goes backwards and forwards between the different sites, modifying their search terms, to gain the best price, they are leaving a trail of **cookies** (see Key Term)

for the firms to add them to their online advertising campaigns. Ever noticed that ad following you around when you've just looked at a website? It's all based on your online behaviour and this is the area that Li and Kannan explored further as 'firm-initiated' behaviour. In some cases this may have been display ads, like the follow-me marketing. But if a user responded to another channel, such as email, the firm may have subsequently sent a nudge email to encourage the web visitor to return to the website and complete their purchase.

Li and Kannan discuss the concept of 'spillover effects', which they explained as the 'impact of prior visits through a given channel' (Li and Kannan, 2013, p. 43). As an example, I received an email that said 'we noticed you left some things in your shopping basket' and I clicked on the email, to return to the website and complete the purchase. The email has an impact on the final step in the path to purchase.

KEY TERM COOKIE

A web cookie is a small piece of data that is stored temporarily or for a period of time on your device when you have visited a website.

There are two kinds of cookie: (a) session cookies, which are temporary whilst you are browsing and do not store your data, and (b) persistent cookies, which remember who you are. Persistent cookies remember usernames and passwords, automatically login to websites and recall what is in your shopping basket.

Service blueprinting

Understanding customer journeys means understanding the process customers take from identifying a need or desire for an item, to the conclusion and purchase. This considers a single track, the customer view. Service blueprinting is another form of process modelling but considers all the actors involved: the customers, staff, delivery – any people or processes that contribute to the overall customer action.

In 'Service Blueprinting: A Practical Technique for Service Innovation' Mary Jo Bitner (the professor who increased the 4Ps to the 7Ps) and her colleagues identified five specific components for a service blueprint (Bitner et al., 2008), which are shown in Table 2.5 with examples.

Table 2.5 Service blueprinting with examples

Service blueprint components	Details	Examples
1. Physical evidence	Tangible elements with which customers come into contact	Website, social media, email
2. Customer actions	All actions taken by customers as part of the process	See adverts, read social media posts, order placing

Service blueprint components	Details	Examples
3. Onstage/visible contact employee actions	Direct customer contact	Email, online chat, social media messages
4. Backstage/invisible contact employee actions	Non-visible interaction with customers	Order processing and management
5. Support processes	Essential business services	Uploading products to the database, ensuring payment systems operate

Activity 2.3 Create a Service Blueprint

Imagine you and your classmates are running a coffee shop.

1. Take five sheets of A3 paper and on each piece write one heading for each element of the service blueprint: 1. Physical evidence; 2. Customer actions; 3. Onstage/visible contact employee actions; 4. Backstage/invisible contact employee actions; 5. Support processes.
2. Split into five groups and identify the actions for each element.
3. Re-group and put the actions in order.
4. What did you learn?
5. How could using a service blueprint improve the customer journey?

2.4.2 BEST PRACTICE FOR CUSTOMER JOURNEYS

Norton and Pine provided a detailed checklist which I have distilled into the key factors and is shown in Table 2.6 (Norton and Pine, 2013, p. 14). This indicates the best practice for developing customer journeys and adopts a strategic rather than a tactical approach which will involve different departments working together.

Table 2.6 Aligning the customer journey and business strategy

Factor	Explanation
Customers	What do customers want and need and when do they need it? How can you approach customers in a coordinated, cross-functional way?
Value proposition	What do customers value – the product, the delivered service, the staged experience?
Resources	What resources are missing?
Channels	How should disparate channels work together?
Revenue	How do you increase revenue based on value created from the experience?
Cost structure	How can you prioritize spending?
Technologies	What technologies could enhance the experience?

2.4.3 VALUING THE CUSTOMER JOURNEY

The reason why we focus on customer journeys is to try to understand what works. We attribute specific actions to specific results. For example, a promotional email may result in a 10% uplift in sales. This type of activity can be tracked and correctly attributed from start to finish. But this is a simplistic approach.

As we have seen in this chapter, consumers take different journeys when making a purchase. They visit a website, then the social media, then they make a cup of coffee and forget about the product. Three days later they think about the product again and the customer journey continues. With the help of cookies (see Key Term above) it is possible to understand what generated the final action. Therefore you can credit which parts of the digital toolbox had an impact and correctly measure the marketing attribution. This makes it easier when allocating budgets to different aspects of the toolbox.

One of the greatest challenges in the digital user journey is when the organisation does not know how the customer arrived at the site – this is known as **dark social** and is creating a headache for many analytical marketers (Cohn, 2013), so much so that companies are having to find ways to address the issue (see Case Example 2.2).

KEY TERM DARK SOCIAL

Originally defined by tech editor Alexis Madrigal in an article on The Atlantic.com, dark social is when a new customer arrives at your website, but you do not know how they heard of you – the source of the visit. They are invisible on your analytics data and therefore cannot be attributed to a specific campaign (Madrigal, 2012).

Dark social happens when friends and colleagues share details via private channels such as instant messages, text messages, email and message boards instead of sharing in wider social media platforms. This means that there is no analytic data (to show the source) in the click through to the website.

Case Example 2.2 Adidas Combats Dark Social

Adidas, the sportswear brand, faced a challenge with content being shared on private social channels, which meant they were unable to connect with customer groups. Florian Alt, the Senior Director, Global Brand Communications from Adidas Football, decided to address the issue of one-to-one conversations via instant messaging by creating hyper-influencers.

Called Tango Squads, these communities of influencers gain first access to new content that they can share amongst their friends and followers. The aim is to build experiences and products for the

target audience. It also means all content can be tracked, all visits can be measured, all expenditure can be attributed and justified.

Alt noted that Adidas needed to listen to what these influencers were saying to understand what type of content works for them.

The programme has been launched in 15 cities with 500 people that are known as 'hyper-connected football creators'. There is a dedicated web page for others to 'join the squad' (www.adidas.com/apps/tangosquad).

The concept has risks as elements of the brand are being handed over to third parties who could abuse the content. Alt has recognised that it is important to allow influencers to talk about the brand, but important that Adidas does react to their feedback.

Challenges with the influencer programme revolve around measuring dark social as none of their current systems could do this. Alt stated that as messenger platforms were built for people to communicate on a one-to-one basis, it wasn't possible to track the conversations. Other difficulties were legal issues such as data protection, but at the moment the community was effective for the brand.

Success will be measured by the number of cities where the Tango Squad is active, along with an increased number of hyper-influencers sharing exclusive content.

Watch Florian Alt talk about the Tango Squad and dark social on YouTube: www.youtube.com/watch?v=rUtyrg0jFBM

Combating dark social

As shown in Case Example 2.2, Florian Alt at Adidas has found a way of addressing dark social. Other methods of ensuring that your hard work can be tracked and correctly attributed include:

- Create short and memorable weblinks – instead of a web link like https://www.permanentstyle.com/2017/09/the-growth-of-bespoke-and-customised-glasses.html?mc_cid=207f13a57c&mc_eid=eb6ecee5ea you may create a vanity URL like this: <http://bit.do/myspecs>
- Create interesting content and place it on your blog with links to products. If the content is unique, you can track all orders from this.
- Include sharing buttons in unusual places – not just at the start and the end, but mid-way through articles and posts.

2.5 WE'RE ALL CONNECTED

In 1969, Harvard professor Stanley Milgram and his student Jeffrey Travers conducted an experiment (Travers and Milgram, 1969) where they handed out 296 letters to people in Boston and Omaha, Nebraska with an instruction to deliver them to one person – a stockbroker in a place called Sharon, Massachusetts. They had to send the letter to someone they knew, close to the target person, to see how many people the letter had to go through to get there. There was no address on the envelope, just the name of the target person and the town. The participants were given a pack of information and told to send back a postcard to the researchers every time the letter was passed on. Eventually 64 letters reached the target person.

The average number of postcards received was 5.2, so the number of degrees of separation between one random person and many other random people was said to be six. 'Six Degrees of Separation' was later the title of a play in 1990 by an American playwright and later a movie. It quickly became a meme, as in an online world, we're all connected.

The idea of six degrees of separation is based on the concept of living in a small world where everyone knows someone who knows that person. Social networks like LinkedIn facilitate these connections. As an example, on LinkedIn I'm connected to John Horsley, the founder of the Digital Doughnut which is a digital marketing community – that's one degree of separation. John is connected to Barack Obama – so this means that I'm two degrees of separation from Barack Obama, former President of the United States!

The first online social network was called Six Degrees, founded by Andrew Weinrich, but it failed due to the technology and infrastructure back in 1997 (Heidemann et al., 2012).

Smartphone Sixty Seconds® – Degrees of Separation

- Use your mobile phone to log in to LinkedIn and look at the Vice Chancellor of your university.
- How many degrees of separation are there between you and the VC?
- Who in the class has fewest degrees of separation between themselves and the VC?

2.6 WE'RE ALL DIGITAL NOW

As digital consumers our lives have become surrounded by online tools, technology and systems – from the moment we wake until the day is over. Can you imagine a world without Wi-Fi?

Governments and businesses are harnessing digital technology too. The European Union publishes an annual Digital Economy and Society Index (DESI) and keeps a scorecard of where European countries feature in terms of available connectivity, digital skills, use of internet by citizens, integration of digital technology by businesses and digital public services (European Commission, 2017).

And now the digital genie is out of the bottle it's difficult to give up our online lives. As digital consumers, even if we adopt greater liquid consumption we're unlikely to give up second screening and showrooming.

FURTHER EXERCISES

1. Working in small groups, identify all online and offline steps in the customer journey for (a) a food delivery app that you access via your mobile phone or (b) a local coffee shop. Analyse where there are any possible difficulties and make recommendations to address these issues.
2. Imagine you are responsible for introducing a new technology into university. This could be a new payment system or a new library access system or something else. Considering the users, identify three objections you are likely to encounter. Write robust responses to all the objections that could be used across social media. Prepare a promotional one-page website to explain the new system.
3. Working in small groups, prepare a plan to complain about poor service from a well-known brand. What steps are needed to gain attention from the brand? Be aware that any comments that are untrue or malicious could result in legal action.

SUMMARY

This chapter has explored:

- Digital consumers and the concepts of hedonism and utilitarian consumption.
- How the technology acceptance model can be applied to the introduction of new apps, devices and systems.
- How changing digital behaviour from consumer power to prosumers, second screening to liquid consumption, affects marketing.
- The key factors in constructing a customer journey have been addressed, with many examples of the different terminology.

PART 2

DIGITAL MARKETING TOOLS

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3

THE DIGITAL MARKETING TOOLBOX

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

Understand the different components in the digital marketing toolbox

Apply the honeycomb model

Analyse website usability

Evaluate online PR

Create an SEO plan for video

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Construct successful emails for campaigns
- Use an email management tool
- Analyse a website's usability and recommend improvements
- Create an SEO plan for video

3.1 INTRODUCTION

In this digital environment, before getting out of bed and brushing their teeth, Millennials are connected. They know the latest news, they know where their friends are, they know what's happening in their world. How much do they know about the methods organisations can employ to harness this digital power for both positive and negative purposes?

This chapter aims to enlighten you about the possibilities of what's out there. At the end of the chapter you may decide to switch off your mobile phone, pay by cash and live completely off grid. But I doubt it.

In part, the digital marketing toolbox could be described as an online version of Pandora's box. The Greek myth claimed that once the box was opened evil escaped into the world, but before all dark deeds left the box the lid was firmly shut, and inside the box a good force remained; hope for the future. Online evil includes **spam** (see Ethical Insights, p. 60), fake news, the abuse of social media profile data, **cyber bullying** and **trolling** (see Key Terms, p. 82). The key is to be aware of all the possibilities and to do more good in marketing, as we will discover here.

3.2 THE EVOLUTION OF DIGITAL MARKETING

Originally, digital marketing was called e-marketing, the 'e' being short for 'electronic' marketing and it was also known as internet marketing. Originally conceived by Sir Tim Berners-Lee as a way of connecting computers to share data, the internet has created its own ecosystem. We have expanded beyond internet marketing to a much wider array of connected devices, hence the term digital marketing.

As digital marketing has evolved, it is still used for sharing data, but it has also provided a rich set of tools, commonly referred to as the digital marketing toolbox. This toolbox works for both individuals and organisations of all sizes. Whether you are studying or working, the digital marketing toolbox allows you to discover, share, manage and create information. This is a journey from information discovery to creation, or a digital information hierarchy.

How does the digital information hierarchy work for you? You might have an assignment to develop a social media account and search online to assess whether Twitter is better than Weibo or LinkedIn for this project. Browsing the internet, you find many articles online that extol the virtues of different social media networks (information discovery). Your friends have the same assignment and some are stuck, not knowing where to start, so you send them some links to useful articles (information sharing). As you start to discover more relevant articles and as your friends start sharing more content you need a way to store all the information easily. In a browser (Chrome, Safari, Firefox) you create a bookmark folder and name it 'social media #1'. Then you add all the weblinks as individual bookmarks to this folder and also save your documents in the cloud (information management). This allows you to easily return to each web page, months later, without remembering the name of the individual web page, and to retrieve your content regardless of which computer you are using or where.

Once you have gathered your data and made your decision, you can create a social media account online and populate it with regular posts about how to set up a social media account (information creation).

Digital marketing makes this information hierarchy much easier, but it hasn't happened overnight. To understand how digital marketing has evolved, I have adapted a timeline based on a version created by internet education researchers Hooley, Marriott and Wellens (2012), in Table 3.1. Their timeline did not include all the tools in the digital toolbox, so I have added these and removed some of those less relevant to marketing. This timeline is a helpful way to understand the evolution of different tools and you will see that some of these were created in your lifetime.

Table 3.1 Development of the digital marketing toolbox

Year	Digital tools	Action	Impact on marketing
1971	Email	First email sent	New skills needed to craft online communications
1989	Websites	Demonstration of the World Wide Web by Tim Berners-Lee	Not widely understood initially
1990	Websites	Public release of the World Wide Web	Companies initially created 'online brochures' known as brochureware for company websites
1990	Search engines	First search tool for the web (Archie) was created	Opportunity to sell computers becomes a realistic proposition
1993	Search engines	First web crawler (Wanderer) was created	Businesses start to list product offers online
1993	Search engines	First graphical browser (Mosaic)	
1994	Search engines	Netscape browser launched	
1994	Search engines	Development of first popular search engines (Alta Vista, Lycos, Excite and Yahoo!)	
1995	Search engines	Internet Explorer launched	
1996	Email	Hotmail launched free email service	Direct mail (postal letters) starts to decline
1997	Search engines	Google released	Search functionality improves and search engine optimisation (SEO) becomes a marketing role
1997	Blogs	First blog launched (attributed to Jorn Barger's Robot Wisdom website)	As websites were cumbersome to change, blogs became an alternative communications tool
1997	Social networks	The first mainstream social networking site, SixDegrees.com, was launched	Businesses use data for online research and opportunities to market to specific groups online
2002	Social networks	LinkedIn launched	Recruitment agencies realised the potential of a large professional database; local job ads start to decline

(Continued)

Table 3.1 (Continued)

Year	Digital tools	Action	Impact on marketing
2003	Social networks	Myspace launched	Opportunities to promote products to specific groups online
2004	Search engines	Mozilla Firefox web browser released	Firefox offers ad-free browsing, so marketers start to think more creatively about online advertising
2004	Social networks	Facebook launched	Companies create Facebook profiles to connect direct with customers online
2005	Social media advertising	Facebook launches first social media advertisement	New skills needed to create short-form ad copy
2006	Social networks	Twitter launched	Disintermediation develops as individuals become their own PR consultants
2008	Search engines	Google Chrome browser launched	Google starts to become the default browser and SEO becomes more challenging

The impact of digital facilities has changed the way many organisations execute their marketing campaigns. Newspaper and magazine advertising is at an all-time low and letter writing has declined, although parcel delivery has increased. Business-to-business exhibitions have reduced, with many taking place every two years, instead of annually, as buyers can more easily search online for new ideas, products and suppliers.

First, we need to understand the contents of the digital marketing toolbox. Extracting the tools from the timeline, I have created a visual representation of the toolbox, as shown in Figure 3.1. There are seven digital marketing tools in order of when they were launched to the world, starting with email and concluding with social media advertising. The rest of this chapter will look at each of these elements, so that you can better understand each of the toolbox components, create a digital marketing plan and evaluate the different tools to use in your own projects.

**Figure 3.1** Digital marketing toolbox

3.3 EMAIL

Since its launch, email has become a powerful marketing tool. The technology research firm The Radicati Group claim that ‘there are over 3.7 billion email users worldwide, and this figure is expected to grow to over 4.1 billion by year-end 2021’ and they also state that the ‘total worldwide email traffic, including both business and consumer emails, is estimated to be over 269 billion emails per day by year-end 2017, growing to over 319.6 billion emails per day by the end of 2021’ (The Radicati Group, 2017).

We all receive email daily, hourly and sometimes it feels like every minute! Students receive emails from their university about module content, hand-in dates, events taking place, as well as reminders to return library books.

Thinking about why organisations use email, the purpose may be to: promote a brand; nurture leads for the future; generate sales; or encourage engagement (such as liking a page, leaving a review). This means that within a marketing strategy, email marketing can have specific, measurable and timed objectives for individual campaigns, but what are the advantages and disadvantages of email as a marketing tool?

3.3.1 ADVANTAGES OF EMAIL MARKETING

Aside from the purpose of email, it is an important marketing tool that provides advantages to organisations as a method of communicating with customers. The Direct Marketing Association explained the benefit of email (DMA, 2017):

Email remains the bedrock of digital marketing. It’s favoured by consumers and 95% of marketers agree that it continues to retain a very important place within marketing.

Reasons why email marketing is popular with marketers include:

- The email or content is delivered direct to the consumer’s mobile or desktop and – unless it’s spam – it is not intercepted by a third party, as a letter sent to someone in an office might be removed in the post room.
- The email process provides key metrics, so that you can see: who opened the email; how many times they looked at the message; if they clicked on any links; and whether they shared the email; if the email generated the required conversion (such as a visit to the website, a sale, or the user sharing more details such as an email address or company information). These metrics mean that every single email campaign can be compared to understand what worked.
- Email is easy to share, as consumers can click on the forward button and send immediately to a friend or colleague. How would I share a letter? I’d either pass to a friend, or scan and email – that’s a lot of effort. Email takes the effort away and simplifies sharing.
- Email can be tested so you can try to see whether image A or image B, or subject line A or B, works more successfully. Email management tools can be automated so that they send 10% of an email with subject line A and 10% with subject line B. Then whichever is most successful – you decide what success looks like and this could be number of opens, number of clickthroughs – is sent to the remaining 80% of your list.

Figure 3.2 shows an example of an email that is optimised for both desktop and mobile, which means it is easy to read, regardless of device. It contains several calls to action with detailed information as well as images.

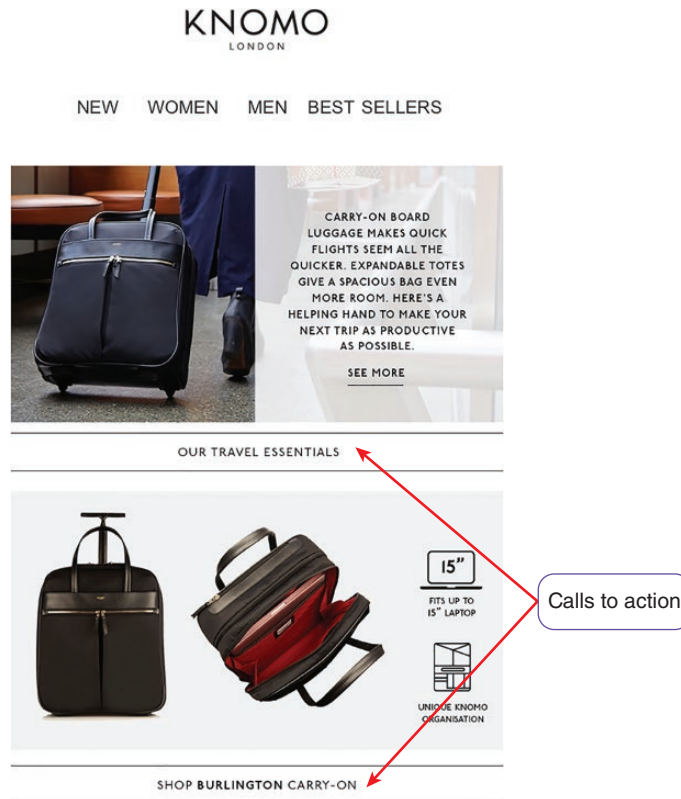


Figure 3.2 Example of email marketing

Source: knomobags.com

3.3.2 DISADVANTAGES OF EMAIL MARKETING

Equally, there are disadvantages of email marketing, such as getting through all the **spam** (see below, Ethical Insights).

Another challenge with email is producing relevant and regular content. Trying to think of captivating headlines and finding words that trigger responses is nearly a full-time role in some organisations.

Another factor is that email is often perceived as being ‘free of charge’ as there are no immediate costs, as there would be if placing an advertisement. But this is not the case. There are many resources required to deliver successful email, both direct costs and indirect costs – such as people’s salaries to manage the process:

- Copywriters to create the headlines and content in the right style.
- Imagery may need to be commissioned or purchased online.
- An email software system, which might be free for smaller volumes of emails but as soon as you send more than 2,000 emails a month, it can be chargeable.
- There is work needed to upload the content, add the correct list and schedule the email delivery.
- Data controllers are needed – someone responsible for managing the data and ensuring no rules are broken.
- Emails often send the reader to a specific web page or landing page. This means some technical web help is needed to create these pages.

Another factor is numbers of email addresses. How many email addresses do you have? The average person has at least two email addresses; one for work and one for home. Students often have at least three email addresses; the one you set up years ago with a funny name (but it's now too embarrassing to share), your latest email address as well as your student email address. Students are not alone in this, and as consumers have multiple email addresses, the challenge is getting into the best inbox – that's the one that's opened and checked most frequently.

Another critical challenge is the issue with safeguarding data, such as your email address, name, address, purchasing history and possibly credit card data. Companies have accidentally released personal information, resulting in big fines (see Key Term – **General Data Protection Regulation (GDPR)** in Chapter 1).

3.3.3 EMAIL TYPES

Email can include planned emails and triggered emails.

Planned emails

Planned emails typically include daily or weekly updates to drive the recipient to take action, such as reading a blog, booking a ticket or other conversion activity. Many planned emails are prepared in advance and organised on a specific schedule.

Triggered emails

Triggered emails occur when an event or activity has taken place. This can include:

- Visiting a website, adding items to the shopping basket but failing to complete the sale
- Filling in an online form to request a download
- Completing a sale
- Making a donation

Triggered emails can be dynamic or automated and built into customer relationship management systems. For example, when a customer makes an enquiry a specific

email is sent. If they respond within three days, they receive the next email in the sequence and if they fail to respond within 10 days a different email is despatched.

3.3.4 WHY AND HOW EMAIL WORKS

Having considered the purpose of email, its advantages and disadvantages, it is useful to know why email works. In 2013, researchers María-José Miquel-Romero and Consolacion Adame-Sánchez held focus groups to look at why email works and they created a theoretical model, shown in Figure 3.3. Their model was divided into three sections: antecedents (what happened before); action (what happened); and consequence (what happened afterwards). Within antecedents they considered that if you know who is sending the email (H1); have positive associations of the sender (H2); believe there is some benefit in the email (H3); are feeling good when the email arrives (H4); and are in a location where you can easily open the email (H5); you are more likely to open the email! Phew! There's a lot to consider.

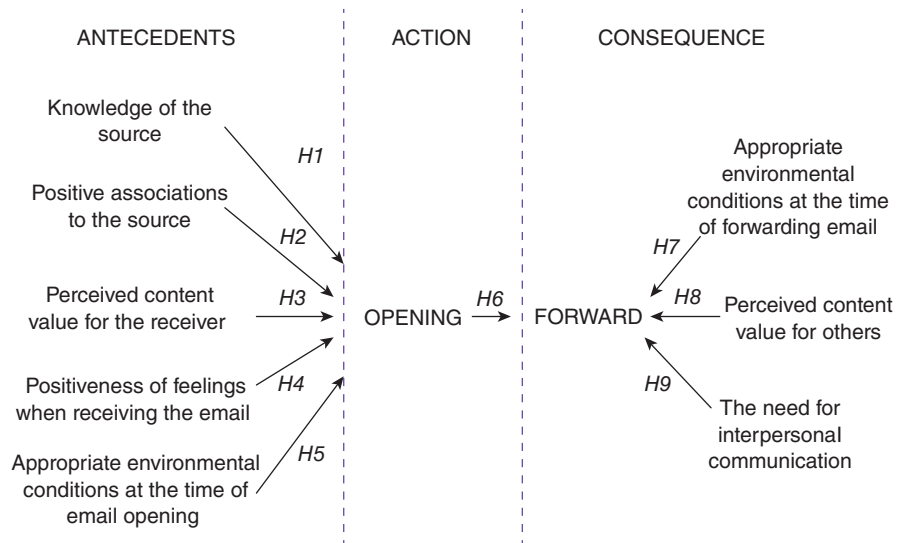


Figure 3.3 Why email works model

Source: Miquel-Romero and Adame-Sánchez, 2013

In the third part of the model, Miquel-Romero and Adame-Sánchez explored how likely you might be to share or forward the email, which was based on three additional conditions: again, if you are in a location where you can easily open the email (H7); if you think a friend or colleague might benefit from the email (H8); and if it is perhaps a while since you have been in contact or just want to say hello, sending the email may be useful (H9).

Logically the model makes sense. If you know the sender, it is less likely to be spam and if it is from a favourite online store, you might be keen to open the email. And whilst we think about the way we can reach people at any place at any time with

email, if you are on the train and it is a complicated message, you might ignore, save until later (and perhaps forget) or simply delete; this is why the idea of 'appropriate environmental conditions at the time' is relevant.

The theoretical model from Miquel-Romero and Adame-Sánchez acts as a useful checklist before starting a campaign.

Smartphone Sixty Seconds® – Opening Your Email

- On your mobile phone open your emails.
- Find an email that you opened that was sent to you from an organisation, perhaps where you have bought something or made contact.
- Why did you open the email?
- Consider the why email works model shown in Figure 3.3. How many of these conditions were met?

3.3.5 PLANNING AN EMAIL CAMPAIGN

The main steps in planning an email campaign are:

- Capture data with consent
- Add into email system
- Segment lists into relevant groups or personas
- Create winning subject lines
- Build in instructions – calls to action
- Create content
- Test to see which subject lines or images work best
- Measure the results
- Update the database

Examples of popular email software systems, which start with free options when smaller numbers are used, or offer a free trial, include: campaignmonitor.com, dotmailer.com, emailit.co, and mailchimp.com. These email management systems usually work via a wizard, with a step-by-step approach to creating an email campaign.

Here is a list of steps involved in creating an email campaign using an online software system:

1. Create a name for your campaign. Pick something you will be able to understand later.

2. Who are you sending this campaign to? You need to add recipients.
3. Who is sending this campaign? Say clearly who this is from. This is usually a person or a company name.
4. What's the subject line for this campaign? The subject should be easy to understand; make it too cryptic and it's more likely to be deleted.
5. Design the content for your email which includes words, images and links to web pages, if relevant. There is usually a selection of themes to pick, based on whether it's a mobile, desktop or html-only email.
6. Confirm the campaign is ready and set the date and time to be sent. It's a good idea to be available when the campaign is sent in case there are any difficulties.

Ethical Insights Spam

Legend tells us that the use of the word spam to mean rubbish email came from the UK comedy TV show Monty Python's Flying Circus. In the programme there is a scene where a group of Vikings drown out conversation by singing the word 'spam' over and over again, louder and louder. This is an example of noisy and irritating behaviour.

The Oxford English Dictionary (Oxford Dictionary, 2017b) defines spam as 'irrelevant or unsolicited messages sent over the internet, typically to large numbers of users, for advertising, phishing, spreading malware, etc.'

Joe Alder, who works in a social media agency in Australia, researched spam in more detail when he was a student at the University of Derby. Joe identified the five types of spam that were defined in 2006 by internet researchers in the UK and the USA (Moustakas et al., 2006):

1. Junk email – bulk sending of unwanted commercial emailing.
2. Non-commercial spam – bulk sending of unsolicited emailing without commercial interest, such as chain letters.
3. Offensive spam – bulk sending of mailings with 'adult'-oriented or pornographic content.
4. Spam scams – bulk sending of fraudulent mailings with the intention to invade the privacy of the recipient.
5. Malicious spam – mass mailings that contain malicious programming code such as viruses and trojans.

3.4 WEBSITES

As we discussed earlier, the first time that websites appeared was in 1990. A handful of companies created basic websites which were little more than static brochures. Today there are over one billion websites worldwide (Internet Live Stats, 2017). The challenge is, with over one billion websites, ensuring your organisation's website can be found amongst all those pages. Interestingly, in a digital age where social media is controlled by the social media companies, websites are one element of the digital marketing toolbox which are totally under the control of the organisation.

Websites exist for many reasons and can provide dynamic insights into organisations. They can share:

- The aims of the organisation (about us)
- Who works there (our team)
- What they do (our work)
- Who they work for (our customers)

Shopping websites offer opportunities to instantly buy online which can be enhanced with:

- Multiple product images
- Videos showing different product views
- Verified reviews from happy customers
- Options for customers to message or chat online to customer service assistants

The key factors to successful websites are: a clear purpose and aim; an understanding of their target audience; regular updates; and website usability. Let's explore each of these elements.

3.4.1 WEBSITE PURPOSE

Website **purpose** is the reason for the website to exist and examples of different websites are shown in Table 3.2.

Table 3.2 Website purpose and function

Website purpose	Website function	Example
An information site	Provide information for existing and potential customers	Government or traditional manufacturing website
A repository of information or materials	Offer online records and resources	Wikipedia
A shopping site	Enable customers to browse and shop	ASOS, Jack Wills, Superdry
A utility site	Enable customers to perform a useful action	Currency conversion websites
A customer service portal	Signpost to a customer login area	IT support services

Specific aims for commercial websites are based around business growth, whether customer acquisition, conversion or retention (see Chapter 9, Strategy and Objectives for more on this model), and may include:

- To acquire new customers
- To convert potential customers
- To retain existing customers

Website aims may also involve market development and product development strategies (Ansoff, 1957), such as to attract new markets or to launch new products.

Non-commercial websites such as those providing a public service will have different aims, often focused around changing behaviour, providing information and encouraging participation. Typically these include health information websites (lose weight, stay fit, stop smoking).

3.4.2 AN UNDERSTANDING OF THE TARGET AUDIENCE

The website target audience may be centred around personas (for more on digital personas see Chapter 4, Content Marketing) so that the website content, whether words, images or video, 'speaks to' and is understood by the target audience.

3.4.3 REGULAR UPDATES

Today, websites are much easier to update and you don't need a degree in maths to use many content management systems. Updates are a signal to search engines that recent content is available to its searchers.

3.4.4 WEBSITE USABILITY

This concerns how easy a website is to use and this simplified term encompasses a whole area of website usability, often known as UX. Dr Jakob Nielsen, a software engineer, is largely credited with defining usability based on five quality components (Nielsen, 2012):

- **Learnability:** How easy is it for users to accomplish basic tasks on the website?
- **Efficiency:** Once users have learned how the website works, how quickly can they perform the tasks?
- **Memorability:** When users return to the design after a period of not using it, how easily can they re-establish proficiency?
- **Errors:** How many errors do users make, how severe are these errors and how easily can they recover?
- **Satisfaction:** How pleasant is it to use the design?

DISCOVER MORE ON WEBSITE USABILITY

Read 'Usability 101: Introduction to Usability' by Jakob Nielsen (2012), available from www.nngroup.com/articles/usability-101-introduction-to-usability. When you have read this, why not select an organisation of your choice and analyse its website usability?

See Template online: Website usability analysis

3.4.5 HOFACKER'S 5 STAGES OF INFORMATION PROCESSING

So how do you create the perfect website, that can be found online? In 2000 an American Professor of Marketing, Charles Hofacker, wrote a book in which he explained how web browsers work. This was a time where websites were new ideas and computers did not exist in most households. Many companies did not see the benefit in websites and I remember companies saying 'but we have a brochure, why do we need a website?'

Hofacker's audience was new to the internet and he created a model of how consumers would process information online (as opposed to a paper brochure). This is known as 'Hofacker's 5 stages of information processing' (Hofacker, 2001) and addressed the strategic issues to consider when creating a website.

1. **Exposure:** Ensuring the web visitor is exposed to the website for long enough to absorb the content.
2. **Attention:** Physical factors such as movement and intensity that attract attention when visitors are on a website.
3. **Comprehension and perception:** How visitors understand on-page content.
4. **Yielding and acceptance:** Ensuring the web visitors accept (believe, trust) your information to get the visitor to stay on your site or proceed to the next step.
5. **Retention:** Getting visitors to remember and return to your website.

Today this would form part of the online user experience (UX) and applies to websites and online ads. It's a useful checklist for planning, creating and testing online adverts (see section 3.6.3 Pay per click (PPC) or search engine marketing). Let's deconstruct the model.

Exposure is still a valid concept today and explains why many organisations place the information you need most on the top of the page. Depending on the website function, such as shopping or providing information, exposure means that you can see what matters most to you, as quickly as possible.

For example, mobile versions of website pages show the menu, search function, saved items and shopping basket all on the top line so there is no need to scroll down for these items.

And it is not enough to hold you on a page; your attention is required! Hofacker was interested in retaining your attention using physical factors such as movement and intensity. Another researcher, Jonathan Steuer, wrote about virtual reality in 1992 and talked about two technological dimensions that contribute to telepresence, vividness and interactivity (Steuer, 1992) and these concepts are directly linked to Hofacker's attention stage.

Telepresence is about having some form of presence across a distance ('tele' is Greek for 'far', so 'far vision' is television and 'far voice', telephone) and Steuer defined vividness as 'the ability of a technology to produce a sensorially rich mediated environment' and interactivity as 'the degree to which users of a medium can influence the form

or content of the mediated environment'. (For more on vividness and interactivity see Chapter 4, Content Marketing.)

Translated into our modern world, vividness is about the depth of imagery and interactivity is about the use of animated GIFS, video content and interactive videos. Go online and find a website mobile page which exemplifies these concepts. The home page may contain many different examples of vividness, e.g. scrolling banners (marquee) at the top with revolving messages and a range of different-sized images in different colours.

After gaining exposure and attention, stage three is 'comprehension and perception', which is concerned with how visitors understand on-page content. We often hear the expression 'don't make me think' and this applies to how people use websites. Jakob Nielsen's 'learnability' falls into this area too.

Many mobile websites include symbols or icons for shopping baskets and saved or favourite items. These have become ubiquitous and are easily recognisable across a range of websites. It is no longer necessary to have a guidebook to explain functions on a website.

Stage four, yielding and acceptance, is about trust in the site or the brand. The concept of trust on websites has been a topic of much research interest by many academics. There are conflicting arguments about whether imagery is a key factor (see, for example, Fone and Sarathy, 2017) or the structure and functionality of the website matter more (Xiaojuan and Ling, 2010). Whilst there may be no definitive answer, organisations like Amazon.com continuously adapt their website, changing landing pages, imagery and calls to action, to see what works for their business.

The final stage, retention, is about memory retention and customer retention, as the focus is encouraging visitors to remember and return to your website. We no longer need to remember the website name. It is likely we may be re-targeted with ads appearing for websites we have viewed after a visit where no purchase has taken place or we may receive a triggered email about an 'abandoned basket'. Plus, if there is a good SEO strategy (see section 3.6.2 Search engine optimisation) it is easy to find websites by searching for the products or services offered.

3.5 ONLINE PR

PR is a catch-all term that tends to represent both public, press and media relations. This has evolved from the time of typing out, printing and posting news releases to local papers, to an online system of identifying relevant news outlets and sharing content; from meetings with key journalists to place important stories about the organisation, to identifying online influencers and trying to manage the online message.

The internet and its worldwide access have enabled these changes and, as a result, the lines between professional and consumer public and press relations have significantly shifted, as we are witnessing:

- 24/7 news
- The internet as a news channel
- The rise of citizen journalists
- Fake news

3.5.1 24/7 NEWS

Smartphone access brings us news updates for every minute of every day. Traditional media outlets, such as the BBC, USA Today and The Times of India, all offer instant news via their apps. There are also personalised news options. By selecting news aggregator sites, it is possible to create your own personalised news feed, based on preferred websites, specific themes and interests (see Key Term – **news feed aggregators** on p.80).

With the advent of news aggregators, news websites and social media sharing, the internet has become a news channel. Combine this with the rise of **citizen journalists** and public relations has become extremely public, on view for all, at any time.

KEY TERM CITIZEN JOURNALISTS

Janis Krums (see Case Example 3.1) was probably the first recognised citizen journalist. Jayeon Lee, writing in *The Communication Review*, commented that 'ordinary people can contribute to the process of news production and distribution as citizen journalists by promptly posting and spreading what they know' (Lee, 2016).

You too can become a citizen journalist! Take your smartphone, start watching the news around you and share online.

Case Example 3.1 When Twitter Became The Breaking News Channel with A Citizen Journalist

On 15 January 2009, a US Airways plane crashed into the Hudson River in New York. Janis Krums, who was on the rescue boat, tweeted the message 'There's a plane in the Hudson. I'm on the ferry going to pick up the people. Crazy' and took a photo which he uploaded to Twitter, via TwitPic, a photo-sharing app, as at that time Twitter was not able to automatically add images.

The image went viral and from this time journalists realised that Twitter had become the place for breaking news.

Source: <https://twitter.com/jkrums/status/1121915133?lang=en>

Case Questions

- Which social media channel do you use for news?
- Look back at your Twitter or other social network and describe a time when you 'heard it first' via social media.
- What did you do when you heard the news?
- Discuss in pairs and present findings to the group.

KEY TERMS FAKE NEWS AND ALTERNATIVE FACTS

Fake news has always existed, often during times of war and crisis, where it was better known as 'propaganda' or 'misinformation'.

During times of elections, such as the 2016 Brexit referendum in the UK and the US Presidential election, many news stories emerged that were fake. The purpose was to discredit the other side and influence voters. The issue with fake news is that it is often shared quickly via social media and, as the stories can seem plausible, people believe what they read.

A change in the development of fake news came in 2017 from the highest office in the United States as an advisor to the President, Kellyanne Conway, used the phrase 'alternative facts' during a Meet the Press interview that was discussing the crowd size at President Donald Trump's inauguration ceremony. Sources varied between claims of very small crowds to the largest audience ever. Conway said it had been the largest crowd and that several news media outlets were reporting 'alternative facts' (Bradner, 2017).

The website Wikitribune (www.wikitribune.com), created by Wikipedia founder Jimmy Wales, is trying to remove and reduce fake news through a news platform that combines evidence and stories with journalists and communities working together.

Smartphone Sixty Seconds® – Finding Fake News

- Using your mobile phone, go online and search for 'fake news'.
- What appears?
- Any stories you thought were true?

3.5.2 THE PURPOSE OF ONLINE PR

Similar to all other elements within the digital marketing toolbox, online PR requires an overall purpose, to clarify its use by organisations. The purpose might be to:

- **Raise awareness** – of an activity, an organisation, its work, its customers
- **Generate engagement** – from its potential customers, existing customers and wider stakeholder groups
- **Provide monitoring** – to understand what is being said about the organisation, whether the sentiment is positive, negative, mixed or neutral (see Key Term – **sentiment analysis**)
- **Manage responses** – to good and bad news

Larger companies may be using online PR for multiple purposes and within each area they have an agreed set of specific objectives. For example, the beauty brand Dove launched a campaign to promote positive body image via social media rather than using traditional media such as television and magazine adverts.

KEY TERM SENTIMENT ANALYSIS

Sentiment analysis is a review of the valence or tone of content. Typically the tone is classified as negative, neutral, positive or mixed. Companies monitor mentions of their brand name, hashtags and specific products.

This takes place on a quotidian basis or for specific events such as new product launches.

Definitions of sentiment analysis include:

- 'Sentiment analysis attempts to identify and analyze opinions and emotions' (Abbasi et al., 2008).
- 'Sentiment Analysis enables us to manually or automatically classify tweets with regard to their emotionality, e.g. positive or negative' (Bruns and Stieglitz, 2013).

One of the challenges in identifying sentiment is that the analysis is often conducted by automated systems, which fail to understand the use of sarcasm, humour and irony.

Case Example 3.2 United Airlines Flight 3411

On 9 April 2017, Dr David Dao was flying from Chicago to Louisville, Kentucky. This is a short flight lasting under one and a half hours. All passengers were on the airplane, waiting for the doors to shut when the cabin crew said the flight was overbooked and volunteers were needed to provide seats. The seats were not needed for other paying passengers, but for some airline staff who wanted to get to Louisville. There are five flights on this route on most days, but the staff could not wait. Passengers were said to be offered \$800 in United Airlines vouchers, if they would take the next flight. There were no volunteers, therefore, at random, the cabin crew selected four passengers, one of whom was Dr David Dao. He said he could not take the next flight as he had patients waiting to see him. The cabin crew were not happy about this, so requested Chicago Aviation Security to remove the passenger. In the meantime, other passengers, many of whom became citizen journalists, started filming the incident. The videos showed Dr Dao being forcibly dragged out of his seat and down the aisle. The videos were uploaded to several social media channels.

Let's explore the timeline of how United Airlines managed responses to the video.

10 April 2017

The United Airlines CEO sends a letter to his staff which is shared via social media. In the letter, he commented that 'the facts and circumstances are still evolving, especially with respect to why this

(Continued)

(Continued)

customer defied Chicago Aviation Security officer the way he did'. He adds, 'As you will read, the situation was unfortunately compounded when one of the passengers we politely asked to deplane refused.'

It is also worth noting, that as many PR professionals will tell you, organisations are 'leaky' and this letter was intended as a letter from the CEO to all staff. Yet someone in the staff decided to share this via social media.

Sharing content with outsiders, or whistle-blowing, indicates ethical concerns within an organisation and, according to researchers Culiberg and Mihelic, is 'one way of drawing attention to wrongdoings in business' (Culiberg and Mihelic, 2016).

Some staff obviously felt strongly enough to share the letter via the media, which exacerbated the overall situation, further worsening the brand image.

10 April 2017

Later the same day, a tweet is posted from the CEO to a public audience. Again, the CEO does not apologise to the passenger, who we learn has sustained severe injuries.

11 April 2017

The next day a hashtag was created, which became so popular it started trending and appearing across Twitter. The hashtag was #NewUnitedAirlinesMottos and many individuals developed alternative, very negative, mottos for United Airlines, including:

- If we cannot beat our competitors, we beat our customers @DHerkes <https://twitter.com/dherkes/status/851835757513846789>
- We're not happy until you're not happy @eslgirl420 <https://twitter.com/eslgirl420/status/852175823746596864>
- We seat you, then we beat you @_Jeff_Glenn_ https://twitter.com/_Jeff_Glenn_/status/852170758575067136
- Board as a doctor, leave as a patient @fanqin0619 <https://twitter.com/fanqin0619/status/851705348385787906>

These negative hashtags, known as bashtags, are not a new idea. The hashtag becoming a 'bashtag' was first mooted with difficulties that McDonald's encountered when trying to generate positive PR for their farmers (Kashmir Hill, 2012). They tweeted using a hashtag #McDStories and this was overtaken with negative comments across social media, resulting in the company's share price dropping.

As United had failed to respond with sympathy or an apology, the outrage grew and in public relations terms, the situation was fast becoming a media disaster, consequently featuring as the top TV and radio news story worldwide.

It was so badly managed it was as if the Four Rs of crisis communications – Recognition, Rehearsal, Response and Recovery – had never been addressed. PR specialist John Moscatelli, writing in the journal *Public Relations Tactics*, discussed the Four Rs and commented that 'most people tackle crises in a risk-avoidance or risk-reduction state' (Moscatelli, 2015) and perhaps this was the intention behind the tweet, where they mentioned 'conduct our own detailed review' rather than addressing the issue.

11 April 2017

On 11 April, the CEO issued a communication on United's website to the 'team' and said, 'The truly horrific event that occurred on this flight has elicited many responses from all of us: outrage, anger, disappointment. I share all of those sentiments, and one above all, my deepest apologies for what happened.'



Figure 3.4 Tweet from AdAge

Source: Twitter

Note the use of the word 'sentiment'. Clearly the negative sentiment online is now visible to the management team and they have decided to react, but returning to the Four Rs of crisis communications, the response has arrived too late and significant brand damage has occurred. The results of this become visible within 24 hours, as the stock price drops.

11 April 2017

The next part of the saga, also on 11 April, saw the disclosure that Dr Dao had engaged two legal firms: a top Chicago corporate lawyer, as well as an aviation specialist. Their statement revealed that Dr Dao had sustained serious injuries and was indeed a patient in hospital.

12 April 2017

As the story unfolded, United Airlines' stock value fell by 1.1%, taking \$255 million off the airline's market capital. This is the time for drastic action and a press conference is convened. What's interesting here is that United reverts to traditional methods of PR – the press conference. Two internationally known public relations scholars, Maureen Taylor and Michael L Kent, have written about the integration of traditional tactics with online tactics during a crisis (Taylor and Kent, 2007) and although this was over a decade ago, their article 'Taxonomy of mediated crisis responses', still explains all the steps to be followed. Little of the advice was recognised by United.

United lurched from posting comments to Twitter, to adding material to its website. Rather than following best practice and setting up a dedicated web page, the response was scattered over several pages, demonstrating a lack of control over the message within the firm.

(Continued)

(Continued)

13 April 2017

The drop in the share price created the need for a press conference and the CEO issued a statement confirming 'We continue to express our sincerest apology to Dr Dao. We cannot stress enough that we remain steadfast in our commitment to make this right. This horrible situation has provided a harsh learning experience from which we will take immediate, concrete action' (United Airlines, 2017b).

The language has changed at this stage and the first public apology, direct to Dr Dao, takes place. We will never know, but I suspect at this stage additional board members stepped in with some stronger advice and required a change in tone, from hostile to sympathetic. The earlier tone of voice used by United Airlines failed to demonstrate any sympathy for, or offer apology to, Dr Dao, yet the research tells us (see, for example, Gensler et al., 2013; DiStaso et al. 2015) that this is the best practice. There is a fear that an apology might result in legal action, but it was clear in this case that a law suit was imminent, as later that same day an image was posted on Twitter showing Thomas Demetrio on the front cover of the magazine *Super Lawyers*, accompanied by a tweet from the *Super Lawyers*, 'if you're curious about Dr. Dao's lawyer, Thomas Demetrio from @CorboyDemetrio, check out our 2009 feature on him'.

14 April 2017

A news story appeared as United Airlines issued a staff bulletin declaring that 'passengers take priority over staff' in over-boarding situations. This is a dramatic policy U-turn in only five days.

27 April 2017

Eighteen days later, Corboy & Demetrio, the lawyers for Dr Dao, issued a statement: 'Dr David Dao has reached an amicable settlement with United Airlines for the injuries he received in his April 9th ordeal, which was captured on video and viewed worldwide' (Corboy & Demetrio, 2017). This is the response and a move towards recovery in the Four Rs of crisis communication, but it has taken far too long and, as a result, United Airlines had to make sweeping changes to their business operations, which were revealed later the same day.

27 April 2017

United issued a press release on its website entitled 'We are making changes to ensure that we always put customers first' (United Airlines, 2017a). This included a two-minute video from the CEO which included the words 'shameful' and 'shocking', along with a commitment to change.

Whilst the agreement and financial details remain confidential, the story is unlikely to have ended here. The volume of tweets and the way the social media posts have become 'legacy content', stored in Google and other search engines, means that it could take years for United Airlines to recover from this crisis and repair significant brand damage.

Case Questions

- Evaluate the strengths and weaknesses of the approach taken by the CEO.
- How could you prepare for such a disastrous event?
- What actions would you take as the event unfolded and negative online comments started?
- Work in groups of three to five to explore what options could have been taken and make recommendations.

3.5.3 SHARING NEWS

Choice of publication channel is a major component in how news is reported and shared, as well as how organisations manage public events. Organisations can share news via their own websites, via social media channels and also via news-sharing sites.

Whilst journalists can access news-sharing websites, they can also proactively find stories using the hashtag #HelpAJournalist on Twitter. Citizen journalists are positively encouraged to contact reporters directly about their stories and experiences with organisations.

The most recognised news-sharing sites include: responsesource.com, mediawasp.com and gorkana.com. These websites are online sources for news stories. They often capture and elicit information via social media, sometimes providing a free service to journalists. They generate an income by charging PR companies to place their news stories.

3.6 SEARCH ENGINES

The major worldwide search engine is Google, which gains over 80% of desktop global searches based on various sources (Net Market Share, 2017; Statcounter, 2017; Statista, 2018). Other search engines with smaller market share include Bing, Yahoo!, Yandex and Baidu.

Search engines automatically crawl through websites to generate a sophisticated database of content using ‘robots’ and ‘spiders’. The content is stored and returned in microseconds when people search online. The pages which are shown to the person searching are called Search Engine Results Pages (SERPs) and usually show websites or specific web pages relating to the search, known as ‘landing pages’.

3.6.1 SEARCH MARKETING

Search marketing, originally called ‘search engine marketing’ by Danny Sullivan who started a website dedicated to search engines, called ‘Search Engine Watch’ (Kritzing and Weideman, 2013), is the practice of improving an organisation’s place in the search engine results. The words used by the person searching are called keywords or key phrases and these can extend to whole sentences, not just a few words.

Some search engines automatically complete the search terms, based on a combination of predictive text, your past search history and what other people are seeking.

With over one trillion searches on Google each year, Google has become the dominant search engine in Europe and the United States. ‘Google now processes over 40,000 search queries every second on average, which translates to over 3.5 billion searches per day and 1.2 trillion searches per year worldwide’ (Internet Live Stats, n.d.).

We are also aware that many searches are unique. When people looking for an item on Google don’t find it on page one, they rarely look at the next page or the one

after that to find the answer. Instead, they refine their search phrase. This means that consumers have become more sophisticated in their personal search strategies and with so many searches taking place, organisations are keen to ensure that they feature higher up the page in the search results.

How search engines rank content

Search engines decide which pages to rank higher on the page based on a mathematical formula, or algorithm. These algorithms are closely-guarded trade secrets and whilst there are companies that offer to ‘get your business to the top of Google’ this is not a realistic proposition as the Google algorithm is said to change incrementally, at least once a day.

What is known is that Google rewards content that is recent and relevant. The concept of ‘recent’ considers the newness of the content, as older content is viewed as dated and less important. The notion of ‘relevance’ is based on how closely it matches the search terms. Search engines identify a series of relevance signals, such as matches to the search terms, whether the terms feature in other parts of the web page, such as in images, headings and the main content.

There are two aspects to search engine marketing: (a) search engine optimisation (SEO); and (b) search engine marketing (SEM), also referred to as pay per click (PPC). These are discussed in the following sections.

3.6.2 SEARCH ENGINE OPTIMISATION (SEO)

The practice of improving an organisation’s place in the SERPs using organic or free methods, is called search engine optimisation, usually abbreviated to SEO. This can be achieved by what’s called *on-page SEO* and *off-page SEO*, which I will explain here.

On-page SEO

On-page SEO concerns the content on the web pages, the speed of delivery and the accessibility of the web page, whether viewed on a desktop, tablet or mobile device.

On-page SEO is why the content on a page is so important. Web content comprises many different items, such as: words, images, video, headings, as well as ‘tags’ and data. Tags are indicators of content importance and can incorporate searchable words. Most websites include space within a web page to add the tags. These tags can be considered as keywords, categories of content and words that help to index the page. **SEO data tags** include meta-descriptions, meta-tags and on-page headings (see Table 3.3). These can be added to the page and contribute towards the way search engines index the pages. As noted by Gudivada, Rao and Paris (2015), over time the importance of different aspects of on-page marketing has increased and decreased.

Websites are written in code and a popular code is HTML – hypertext mark-up language – and we will see examples here of HTML. Meta-descriptions are the snippets used by search engines in their results pages – the pieces of text displayed online. The HTML code includes indicators for the search engines to show the different data tags, as shown in Table 3.3.

Table 3.3 Examples of HTML code

Code item	Details	Example
Meta description code	This is placed in the head content of the relevant web page	<pre><head> <meta name="description" content=" Building an Online Community. Discover how to build an online community through the four steps from identifying your goal to selecting the platform."> </head></pre>
Meta tags	On-page headings are arranged in priority order. Google ranks title tag as the most important and then heading 1 above heading 2	<pre>Title tag looks like this: <head> <title>Building an online community.</title> </head> Heading 1 tag looks like this: <h1>Why build an online community?</h1></pre>

You will see that each tag is enclosed in <brackets> and the tag is closed with a slash / before the tag word.

Website tools like Wordpress include pre-set boxes where the code is added automatically. To learn some code, see Digital Tool: HTML code websites. (See also Figure 4.1 From keyword to long-tail keyword.)

Digital Tool HTML Code Websites

When I started coding I used Elizabeth Castro's book HTML for the World Wide Web, which is now very dated, but still valid! There are more resources online, such as these digital tools:

- w3schools.com
- simplehtmlguide.com

Website speed is another critical issue, as Google may be able to access how quickly (or slowly) a web page is presented to the viewer. The speed of delivery, or page loading speed, is a factor in whether or not a visitor waits for the page to open or goes elsewhere.

Website accessibility has become more important and this involves how easy the web pages are to access, regardless of whether on a desktop computer, laptop, tablet or mobile device. Many websites were designed for desktop computers, although consumers access them via mobile phones and are unable to read and therefore access the content. Google rewards accessible websites in preference to those with less accessibility.

DISCOVER MORE ON SEO

Read 'Understanding Search Engine Optimization' by V. Gudivada, D. Rao and J. Paris (2015) in the journal Computer.

There are tools to check website speed, performance and content, which contribute to the on-page SEO. Here are a couple, and to get started you could visit one of these sites, copy and paste a web address (its URL, which stands for Uniform Resource Locator) and watch the results!

www.websitegrader.org
<http://nibbler.silktide.com>

Off-page SEO

Off-page SEO relates to methods of mentioning the web page in other places. Typically this includes an organisation's social media pages, a Wikipedia page (if they have one) and any website links on other web pages. The aim of these web links is to drive traffic back to the organisation's website.

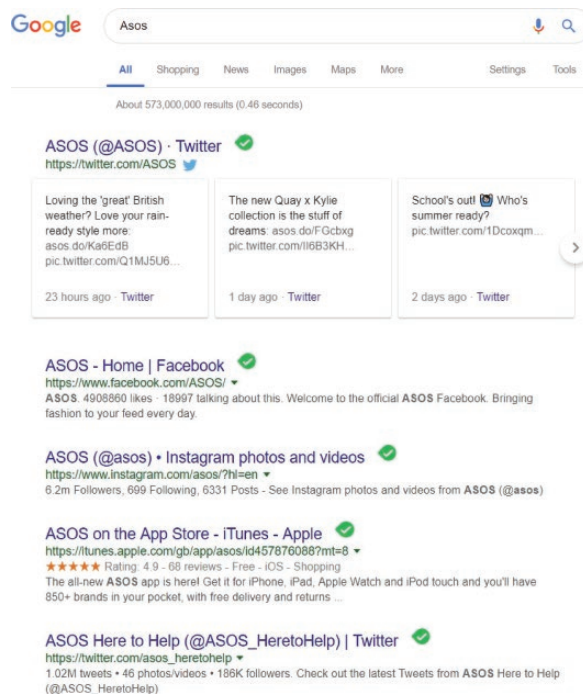


Figure 3.5 ASOS off-page SEO

Source: Google.co.uk

So how does it work? You need to find relevant pages to add content, so this might include a directory or local web portal. It may be that social media pages, using the organisation name, are needed too. Just search for a company name and see what results appear. Look at the example in Figure 3.5 of the ASOS off-page SEO. After showing its website, the next entries in the search engine are Twitter, Facebook and Instagram.

Whilst other off-page SEO is achieved through adding links to the web page on relevant directories, these might be fashion directories, or with a company like GAME it might be gaming links. However, the links should be relevant to the website and the use of link farms should be avoided. As companies realised that Google rewarded external links, many sought to gain as many links as possible. This resulted in the creation of 'link farms' where many single-page websites were established and companies were sold 100 links for just \$25.

The issue was that many of these links were totally irrelevant and not a measure of website quality, just a count of the number of links they had achieved. When monitoring search engine behaviour, Google realised what was happening and stopped rewarding those showing irrelevant and spam links. This had a negative impact on many websites, which suddenly disappeared from Google's search results until they removed the irrelevant links.

3.6.3 PAY PER CLICK (PPC) OR SEARCH ENGINE MARKETING (SEM)

Whereas search engine optimisation focuses on organic, natural or free optimisation of webpages, search engine marketing involves payment and is also known as 'pay per click' or 'price per click' marketing (PPC), or more recently, paid search.

As search engines deliver results based on search terms, they also include adverts for organisations providing the searcher's request. One way to achieve the top position on a Google page is to buy adverts. The adverts are sold on an auction system, so the organisation that pays most has a better chance of gaining the top place on the SERP.

The original advertising model on search engines was to 'pay per click' where the organisation was charged for each 'click' when someone searched for an item, found a result and then clicked onto an advert to be directed to the web page. Search engines have since created a range of different advertising payment options, with varying advantages and disadvantages, which are based on auction models. This means that the more in demand the keyword or key phrase or target audience is at that time, the more expensive the click, view or follow. Search engines also consider other factors such as the content on the landing page, the standing of the organisations bidding for the keywords and the quality of the advert content.

Let's look at more on each of these advertising models (and see also section 3.9.3, Social media advertising bidding options).

Cost per thousand (CPM)

CPM is a historical term, for cost per mille, which means the cost per thousand impressions. So, as soon as your advert has been shown one thousand times, you are charged.

This was initially the main method of advertising and is often used for brand awareness campaigns. The downside of CPM is that your advert might be shown to the wrong audience who cannot afford the goods, or do not have the interest being promoted, but you are still paying when they see the ad.

Cost per click (CPC); also pay per click (PPC)

CPC is one of the original methods of buying advertising online. Your advert is shown to the target audience based on the keywords and key phrases that you use and if they click on the advert, you are charged.

CPC is the antidote to CPM, and although your ad is shown to a wide group of people, you only pay when they click on the advert. This allows you to automatically exclude the wrong target customers. This means that if you are promoting luxury holidays, you target those whose interests include luxury brand names and perhaps add in an approximate cost, to put off those where it is outside their budget.

Cost per action (CPA)

CPA is a newer method of advert buying and mainly takes place on social media, which has the advantages of being a results-orientated approach. Your advert is shown to the target audience and they might click on the advert, but until they take a specific action such as a website conversion, you are not charged.

Website conversions include:

- A sale, i.e. a purchase added to a shopping cart or a donation on a charity site
- Providing email data for registration or an email list
- Video view
- Social share, like or follow

The CPA method works because you allow a piece of code, called a pixel, to be placed on your website. The pixel tracks the customer journey from start to finish and advises the social media platform when the agreed action has been performed.

Typically, when a customer buys a product online, or registers for a newsletter, the last action is the 'thank you page' which is displayed after the order or request has been confirmed. This page has a dedicated web address (the URL) which only appears when the action is completed. This is the page that the pixel can track.

Cost per view (CPV)

As the name indicates, cost per view is designed for video adverts where individuals view a video clip. How does it work? Your video ad is shown, on a video platform. Often this is on platforms like YouTube. Before you see the video you want to watch, you are shown an ad, with the message that you can 'skip the ad in 5 seconds'.

To add value to the advertiser, the viewer has to:

- Watch at least 30 seconds of the video advert

- Or watch the whole advert if it's shorter than 30 seconds
- Or engage with your video, by clicking a call to action such as 'order now', 'learn more', 'visit website'

The most expensive keywords

According to an author on Search Engine Watch (Lake, 2016a), the top three most expensive keywords in the United States were:

1. best mesothelioma lawyer
2. dallas truck accident lawyer
3. truck accident lawyer houston

I should add that these have been the most expensive keywords for many years! Only those with mesothelioma would click on a CPC advert, whilst the rest of us might not be able to pronounce it or even know what it is (a terrible cancer).

The same author on Search Engine Watch (Lake, 2016b) explains that the top three most expensive keywords in the UK are:

1. play live blackjack
2. rolete
3. live blackjack

If you are wondering, number two in the UK is roulette, although it is mis-spelled, as typographical errors are important keywords. Search Engine Watch commented that 'typos are regularly spotted in the top 500 results'. Who knew that the most expensive UK keywords were all based on gambling!

Google Ads

Probably the best-known online advertising platform, Google Ads (formerly Google AdWords), provides instant access to easily start ad campaigns. Like email marketing software, the platform uses a wizard to help. This changes frequently, so search for Google Ads to see how this works.

If the objective is to drive traffic to a website, after the URL is added, Google Ads will show potential keywords and their monthly volume. Based on this, it provides an indication of how much to bid. If you consider the most expensive keywords (mentioned above), they will be available for in excess of \$750 a click! If you are managing the social media for a local firm of UK accountants, this could be £2.50 per click. The key factor is that this is an auction model; whoever pays most gets further up the results page.

Pay per click or PPC is a complex and specialist area. Google provides a range of helpful videos and online tutorials which contain the latest best practice. Visit the Google Ads help centre (<https://ads.google.com>) which is a useful tool to understand PPC. See also the Bing help site for ads (<https://help.bingads.microsoft.com>).

Video adverts

Adverts are not all static words and images; they include video too. Video adverts also require the addition of keywords, meta-data, descriptions and more details. Choudhari and Bhalla (2015) recommend attention should be paid to the different aspects of the video, including:

- **Keyword research** – explore YouTube keyword suggestions and ensure they are relevant
- **Video tags** – keep the video name relevant to the keyword rather than using the automatic naming function; they give an example where a ‘name like vo231232.mov will create ambiguity’
- **Title** – this should include the keyword as this is where most engines will start their search
- **Description** – this is about creating interest for the viewer, so avoid descriptions about the place, time and date of the video’s creation which have no bearing on the viewer
- **Thumbnail** – these are the frames from the video and are automatically created; it is better to add in custom thumbnails
- **Video transcript** – the sub-titles of video content, which again is used by search engines

3.6.4 DO ONLINE ADS WORK?

The effectiveness of online ads has been called into question, following a study where eBay claimed no difference in web traffic when they stopped advertising on a large search engine (Blake et al., 2015). This is largely connected to the power of the brand name, as eBay is so well known that it may not need to promote its brand.

Based on this study, researchers Daisy Dai and Michael Luca experimented to see if search ads worked using the Yelp recommendation platform. Their study involved 7210 restaurants who were randomly given free advertising packages, to assess whether or not this impacted visits to their website. These restaurants were all smaller businesses, so in no way comparable to eBay, the largest auction site on the internet (Dai and Luca, 2016).

The conclusion was that the advertising had a positive impact as the results demonstrated paid search worked for smaller restaurants because they gained:

- Increased page views on Yelp (more on mobile)
- More map enquiries (where are you located?)
- More telephone calls
- More web visits

Do online adverts on search engines work? That depends whether you are a large, well-known company or a smaller, local business!

3.7 BLOGS

When websites first became available, they were created using complex programming systems, which meant that it was expensive to add new content to web pages. As a result, many companies developed blogs outside their main website to share regular and updated content, which mainly focused on company news. As many content management systems evolved and free blogging programs were launched, these tools enabled additional website functionality with the option of adding pages (rather than just posts), categorising content, adding in custom designs and choosing either free or paid-for hosting options.

3.7.1 THE COST OF BLOGS

Blogs can be free to set up and you can start creating content immediately. The cost of blogs includes the time to prepare and develop the written content, licensing fees for images and time to promote the content once written. There is also the emotional cost of constantly trying to create new content to blog about!

3.7.2 WHY ORGANISATIONS BLOG

Most organisations have a blog within, rather than outside, their website. This is a strategic search marketing decision, as regular content within a blog page brings specific benefits:

- Blog pages are recognised as being updated and **news feed aggregators** (see Key Term) looking for web pages that end with the suffixes /blog or /news or /rss can add the updated content to news feeds.
- Once the content has been created, it is always there.
- Older content continues to be found.
- Blogs provide more opportunities for keywords and key phrases to be included within the blog post.
- Blog posts can be shared over and over and over.
- Blog posts can be updated, which signals the strength of a specific post to search engines, such as Google, which can re-index or prioritise the post for searchers.

Two well-known examples of free blogging tools are Blogger, which was launched in 1999 and subsequently bought by Google in 2003, and Wordpress, which started in 2003 and is said to be used as a website platform for over 15% of websites worldwide. Newer blogging tools include www.wix.com and www.tumblr.com but beware that Tumblr is often blocked as it permits unrestricted imagery and sometimes content of an adult nature! Schools often block Tumblr, as do many companies.

KEY TERM NEWS FEED AGGREGATORS

News feed aggregators, or news aggregators, or feeds, are websites that collect content from other websites, where there is a recognised news feed. To activate your personalised news feed, simply select a news feed tool and add in the websites that you want to follow; you can also include topics of interest and other websites will be suggested.

You can either pull the content, by visiting the news aggregator as required, or opt for a push to your device to gain regular updates when new content appears. Many of these tools also offer an app, allowing instant access via mobile devices.

Examples of news feed aggregators include:

- chimpfeedr.com – Chimp Feeder, from the company that created Mailchimp.
- feedly.com – Feedly, a long-established news feed website that allows you to group content into specific themes (e.g. tech, digital, marketing).
- flipboard.com – Flipboard, similar to Feedly and popular with Apple users.

3.7.3 WHAT MAKES BLOGS SUCCESSFUL?

Researchers Angela Dobeles, Marion Steel and Tony Cooper created a model of blog success, as shown in Figure 3.6 (Dobeles et al., 2015). Based on case study research, this team looked at key success factors in corporate blogs and identified seven issues: corporate culture, content, context, channels, connectivity, co-creation and customers. They recommended that the blog content should echo the corporate culture, so that the same message was communicated and was ‘firmly grounded in context’ (p. 1100), which means that the context or topic should be relevant to the target audience.

The channels also needed a connection to the content, as well as the audience, who might utilise offline as well as online channels. This means ensuring the content is appropriate for the channel used. As an example, a Twitter post, or short-form content, requires a pithy approach, like a billboard advert. A long piece of content could be suitable for a blog post or the same content could be adapted for a printed publication.

The links between different bloggers and channels described the connectivity and the impact the blog content would have. So, if content is distributed to and seen by a trusted network, it can be further shared amongst a much wider audience and gain greater impact.

Co-creation within blogs allows customers to comment and start conversations with each other and with the company, ensuring that customers can drive the content.

The single biggest challenge of using blogs is constantly creating new content. This can be addressed through the use of a content calendar (see Chapter 4, Content Marketing).

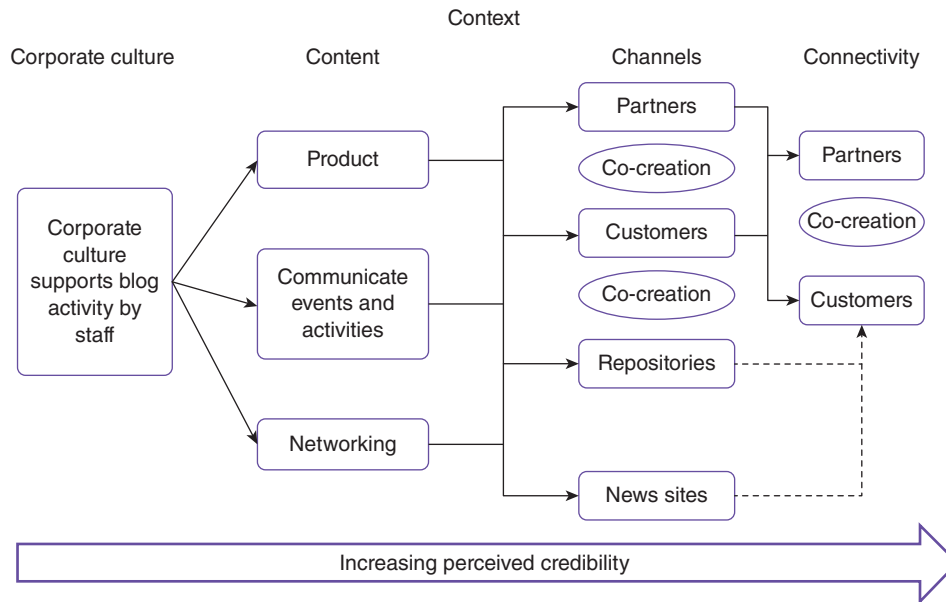


Figure 3.6 Model of blog success

Source: Dobele et al., 2015, p. 1098

3.8 SOCIAL NETWORKS

Social media networks started in 1996 with the launch of the first mainstream social network, SixDegrees, which allowed people to create profiles and invite their friends to join (Kietzmann et al., 2011). An early pioneer of social networks, SixDegrees closed in 2001 as too few people had internet access and the concept of online networking was not widely understood.

3.8.1 THE MAIN SOCIAL MEDIA PLATFORMS

The main social media platforms in the UK and the USA are considered to be Facebook, Twitter, YouTube and LinkedIn. The first of these to launch was LinkedIn in 2002, followed by Facebook in 2004, YouTube in 2005 and Twitter in 2006.

Today Facebook has over one billion users, Twitter sees a billion tweets being shared a day, YouTube claims over one billion monthly users and LinkedIn is approaching half a billion members in over 200 countries.

Instagram launched in 2010 and Snapchat followed in 2011. Instagram has over 800 million monthly active users, Snapchat has over 300 million. Over time, social media networks have attracted the attention of organisations, because of the growth in the numbers of members and the ability for organisations to contact them and target advertising based on user profiles. Social media has become a powerful

communication medium, where consumers can complain about poor service and get much faster responses.

3.8.2 ADVANTAGES AND DISADVANTAGES OF SOCIAL NETWORKS

In a positive way, social media allows old school friends to connect, older people to stay in touch with family members and friends to plan and organise events.

Different platforms help different people to:

- Stay in touch with friends and family (Facebook)
- Find the latest news (Twitter)
- Learn how to keep chickens and bake a cake! (YouTube)
- Promote your professional and personal brand (LinkedIn)
- Keep and view images of food and fashion (Instagram)
- Share ideas and themes (Pinterest)
- Discover presentations (Slideshare)
- Share funny images with friends (Snapchat)

There is a downside to social media, with people using it negatively and demonstrating online antisocial behaviour to bully others and troll online communities.

KEY TERMS CYBER BULLYING AND TROLLING

Researchers from a psychology department, Serkan Volkan Sari and Fatih Camadan, define cyber bullying as 'a deliberate, repetitive and permanent behavior pattern against a defenseless victim mostly by an unknown group or individual through electronic environments such as text messages, picture/video clips, phone calls, emails, chat-rooms, instant messages and websites' (Sari and Camadan, 2016).

Likewise, the act of trolling has been defined as being 'a negative online behaviour intended to disrupt online communications, aggravate internet users and draw individuals into fruitless debate' (Coles and West, 2016, p. 44).

Susan Herring and colleagues (2002, p. 375) provided three criteria for troll behaviour:

1. Messages from a sender who appears outwardly sincere.
2. Messages designed to attract predictable responses or flames.
3. Messages that waste a group's time by provoking futile argument.

For more on trolls, including a typology of different types, read the article 'Representations of "trolls" in mass media communication: A review of media-texts and moral panics relating to "internet trolling"' by Jonathan Bishop (2014).

Cyber bullying and trolling (see also Chapter 5) are unacceptable behaviours and have resulted in custodial sentences (Synnott et al., 2017). There is advice on how to tackle this unacceptable behaviour on these websites:

www.bullying.co.uk/cyberbullying

www.internetmatters.org/issues/cyberbullying

www.anti-bullyingalliance.org.uk

In the future the concept of trolling may disappear, as Justin Cheng of Stanford University and his colleagues are researching 'Antisocial behavior in online discussion communities'. Effectively, they are seeking trolls (Cheng et al., 2015) and their research shows that it is possible to predict whether a user will be banned from a community (not all trolls are banned) and also identify antisocial (or troll) behaviour. So it may be possible to spot trolls and remove them from communities before they do harm to others.

3.8.3 THE BUILDING BLOCKS OF SOCIAL MEDIA

What's the benefit for business of social media? Jan Kietzmann, a professor in Canada, and two colleagues (Kietzmann et al., 2011) explored this and identified how social media could be used and how this impacted business. They had identified that individuals were using social media to develop content yet firms were ignoring potential business opportunities within social media due to a lack of understanding.

To explain social media to businesses, Jan Kietzmann and his colleagues created the 'honeycomb model', named due to its shape. These seven elements or 'building blocks' were intended to help managers in organisations understand their audience and address their specific needs. Let's look at the model and what this means in Figure 3.7.

Identity in social media

The central focus was identity and is concerned with the amount of personal identifiers or information that is shared by users. Imagine you're using Facebook. It knows your name, age, where you went to school, who your friends are and your birthday. That's just for starters. As an example of how businesses could use this data, they could organise advertising around your birthday (hold your birthday celebration at our place! Or add this to your birthday wishlist!) or show adverts for films your friends have watched and liked. Suddenly the data becomes useful and has a real value.

But some people use nicknames online, especially in Snapchat or Instagram, so you become harder to track. But in social media platforms like LinkedIn, you will use your real name, add your qualifications and your date of birth (even if that data isn't shared on the platform).

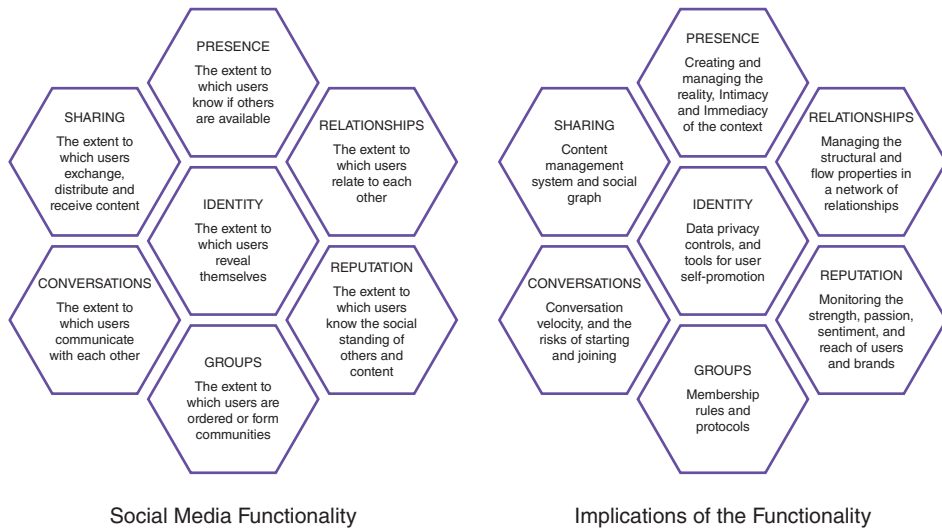


Figure 3.7 The honeycomb model

Source: Kietzmann et al., 2011, p. 243

The issue is how companies use this personal information, and with the introduction of GDPR (see Key Term – **General Data Protection Regulation (GDPR)**, p. 19) this may change.

Social media networks provide access to specific and distinct groups of people, due to the data collected when users register, which may include: demographics, psychographics and webographics, which are explained in Table 3.4 with examples.

Table 3.4 Personal data available via social media pages

Data type	What this is	Examples
Demographics	Personal and socioeconomic information	Name, date of birth, place of birth, home town, employment history, education details
Psychographics	Attitudes, hobbies, interests	Relationship status, family members, friendship groups, religious affiliations, political views, hobbies, preferred music, films watched, favourite brands
Webographics	Online behaviour, devices used, site usage	Facebook fan pages liked, comments added, downloads performed, purchases made, actions taken, devices used, operating systems.

Conversations in social media

Around the edge of the honeycomb model, the next building block is conversations. This is about how users communicate with other users. This varies between platforms, as on LinkedIn you are likely to be professional and courteous, whereas on Facebook you could be as rude to your friends as you dare!

When you are having a conversation with businesses, you might be having conversations about their products or services, either positively or negatively. This means that firms need to monitor those conversations and respond accordingly. After all, if someone was talking about you online, you would want to know what they were saying! (See above, Key Term – **sentiment analysis**.)

Sharing in social media

The next building block is sharing and is about how users share content. We all see funny memes (see Key Term – **meme**) on Facebook and sometimes we share and sometimes we don't. What makes us share? Kietzmann and his colleagues noted that businesses needed to understand the common social networks used by their audience and secondly to ensure they created content that was easy to share.

KEY TERM MEME

The word meme was coined by Richard Dawkins in his book *The Selfish Gene* (Dawkins, 2006, p. 192). He described a 'new kind of replicator' as we are sharing more and more content. As a result he sought a word to describe this 'cultural transmission' and started with the word 'mimeme', which was based on 'imitation' but he wanted a shorter word so abbreviated this to 'meme', adding the comment 'it should be pronounced to rhyme with "cream"'.

Presence in social media

Presence is a key element in social media and is also a building block in the honeycomb model. A key constituent of presence is whether you decide to let others know you are present. Some secret social networks such as Whisper and Yik Yak exist due to anonymity. Yet on other social networks your real identity to confirm your authentic self is key and also evolving.

On Facebook there was a time when you could use nicknames, but they created the 'real names policy' to force individuals to use real names rather than nicknames. This caused considerable difficulty for people whose real names appeared to be nicknames and Facebook subsequently relented, to a degree! Today you are encouraged to use your real name and add a nickname where appropriate (Facebook, 2018). If your name is not seen as authentic, or say you changed your name by deed poll for personal reasons, this can create difficulties and you need to submit proof such as legal documents to prove your identity.

On LinkedIn you can go one step further and let people find you with your real name but also indicate that people you have never met can connect with you by indicating that they are 'open networkers', which means they accept all invitations. I would not recommend this as LinkedIn then becomes a business card competition (who has most connections) rather than a trusted network of genuine people you have met or had a conversation with.

Presence does not just mean letting people find you, it also means telling them you are online right now. Facebook Messenger shows if users are online at that moment and WhatsApp shows when you are active. Location check-in apps such as Swarm also show businesses that there are possibly customers nearby. This means they could organise specific offers to those on their doorstep such as 'today we have new clothing ranges in store'.

Relationships in social media

An important construct of social networks is relationships and how users are related to one another, whether by association, or through sharing of objects or as friends. There are different types of relationships: some formal or informal; some regulated or unstructured.

LinkedIn shows the relationships via their degrees of separation. There are two concepts here: **tie strength** (see Key Term) and **degrees of separation** (see section 2.5 We're all connected), as within an online world it's difficult to be without presence. LinkedIn works on tie strength as people you have met once or perhaps twice might reach out for a request to help and, within a professional setting, many people will provide assistance. LinkedIn also exemplifies the concept of the six degrees of separation: as I mentioned in Chapter 2, it turns out I'm separated from former US President Barack Obama by two degrees! This is indicated by the number under the photo.

LinkedIn has probably become the main reputation tool for professionals worldwide. Reputation in the honeycomb model looks at how users can identify the social and professional status of others. For example, LinkedIn encourages users to explicitly demonstrate their professional standing by gaining recommendations and endorsements. If you are untruthful about a qualification, this can easily be verified by others who took the same qualification at the same time.

KEY TERM TIE STRENGTH

An American professor, Mark Granovetter, conducted research into 'social networks' back in 1973, which we describe as a pre-digital age. These were offline, rather than online, social networks and he discovered that people were more likely to help a contact they did not know that well (weak tie), more so than someone they knew well (strong tie), demonstrating the strength of weak ties and the benefit of a larger network (Granovetter, 1973).

Reputation in social media

Social media content also has reputation. How many subscribers are on your YouTube channel? How many followers on Twitter? How many likes for your latest blog post? In an online world, reputation must be monitored, managed and measured to ensure that the right content is being delivered and that relevant performance indicators are being met (see Chapter 13, Digital Marketing Metrics, Analytics and Reporting).

Within business, reputation is demonstrating trust and authenticity to foster engagement. Sometimes business gets this wrong, as happened with Pepsi Cola and Kendall Jenner. The company piggybacked onto the 'Black Lives Matter' campaign for a video advert and created a furore online as many people complained. Pepsi Cola apologised and the video advert was withdrawn but not before it had been shared on YouTube over 10 million times.

Groups in social media

The final building block on the honeycomb model is groups. How can users form groups and sub-groups? There are many examples of types of groups in social media that allow users to categorise their friends, fans and followers, for example:

- LinkedIn has hundreds of thousands of business groups and I suspect many are empty and there should be an auto-close function if a group hasn't been active for over two years!
- Twitter allows users to create lists, making it easier to view content from a smaller collection of other users.
- Facebook allows individuals to start groups of friends, for causes or for campaigning.
- Facebook also enables the creation of separate groups for colleagues, family and friends.
- WhatsApp allows you to build family, friends and work groups. The only difficulty can be sending the right message to the right group!

Activity 3.1 Apply the Honeycomb Model

Identify how you use social media using the elements in Figure 3.7 The honeycomb model and explore whether you have single or multiple identities online, if you talk about brands online and so on. Then on the opposite side, look at how businesses connect with or try to speak to you, using your social media channels.

See Template online: Application of the honeycomb model

3.8.4 THE UTILITY OF SOCIAL MEDIA FOR BUSINESS

This enables social media to be harnessed for business purposes on many levels. Table 3.5 shows the different utilities for social media and the elements where this can be applied.

Table 3.5 The utility of social media for business

Utility	Element
Brand	<ul style="list-style-type: none"> • Extension of the brand presence
Communication	<ul style="list-style-type: none"> • Facility to communicate to existing customers • Method to speak with potential customers • System for stakeholder communication
Customer service	<ul style="list-style-type: none"> • Service for responding to customer issues
New products	<ul style="list-style-type: none"> • Mechanism to crowdsource ideas for new products • Platform to launch new products
Recruitment	<ul style="list-style-type: none"> • Source of new staff
Research	<ul style="list-style-type: none"> • Vehicle to find new markets • Resource for finding new suppliers or services • Tool to undertake research and investigate market size

Whilst social media platforms are free to access and it may be free for companies to add content to them, reaching the target audience is more challenging. As an example, Facebook typically shares **organic posts** with fewer than 10% of those that 'like' the page. This means to gain attention from the audience, advertising can be required (see Key Term – **organic posts**).

KEY TERM ORGANIC POSTS

On social media platforms like Facebook an organisation can reach its target audience in two ways: via (a) paid ads; or (b) organic posts. Your organic reach is the number of people who saw the content, without you paying to promote it, as opposed to the paid reach – the number of people who saw the post after you invested in advertising to share it.

Organic posts typically include unpaid updates that are not sales focused. If they are too promotional, the social media platforms like Facebook are less likely to share the content widely as they deem this to be poor quality content, unless of course you pay to promote it!

They are often a simple text-only update or snippet of information, web link, photo, cartoon, image, animated GIF or video, and these are simply added direct onto the Facebook page.

Source: applecoredesigns.co.uk

3.8.5 IS SOCIAL MEDIA FREE?

Many organisations seem to think that social media is free of charge. There are no direct financial costs to set up a Twitter, LinkedIn, Facebook or Tumblr page. However, there may be additional resources and associated costs, such as people to create content, licensing rights for re-using imagery, and production costs for creating video and software to help deliver campaigns and maintain the pages.

Researchers Adam Mills and Kirk Plangger investigated the question as to whether social media is free and noted importantly that there are associated costs, either setting up the social media platforms or maintaining them with the addition of regular content:

Even though most social media have no priced fee to access the channel or set up brand pages, online services managers may face significant resource investment costs to ensure that the brand is presented in a professional light that maintains the reputational integrity of the brand. (Mills and Plangger, 2015, p. 530)

To clarify the issue regarding free and the required resources, Mills and Plangger looked further into online media and their aim was to establish a strategy for service brands who were transitioning from an offline traditional environment, to an online space.

They considered social media as an 'avenue for customer engagement' (p. 522) and flagged the issue of which social media channels were appropriate, based on costs. To that end, Mills and Plangger firstly grouped social media tools into four areas and secondly created a simple matrix that considered both the setup investment and maintenance investment, based on the type of social media. This is a useful framework for considering the resources required for digital tools and is shown in Figure 3.8.

The four groups of social media were based on the primary functions of the sites and consisted of:

- Blogs/microblogs
- Social networks
- Picture sharing
- Video sharing

The social media investment framework is based on (a) the initial set-up costs; and (b) the ongoing maintenance. At the initial setup stage the investment was based on a binary system of high or low, focused on the resources needed.

Picture sharing was seen as having a low set-up cost as it involved adding images to a site. In the same way, blogs were also seen as being less demanding on resources at the start. The start of a blog is a single post or a tweet in the case of a microblog. This contrasted with resources required to establish a video-sharing site, as more equipment and skills may be needed to organise a video.

Social networks were seen as needing more resources from the start as customers may decide to engage with the firm and ask questions which need responses! This could involve staff training, agreeing how to respond to messages and if it is 24/7 or only in working hours.

The ongoing maintenance is viewed as highest with social networks for the same reason: customers asking questions; regular content required; and a team to monitor what's being said. Mills and Plangger recognised that even blogs and microblogs may need responding to daily and potentially contemporaneously. They felt that the expectations of responding faster on video- and picture-sharing websites would be lower, so these would be easier to maintain.

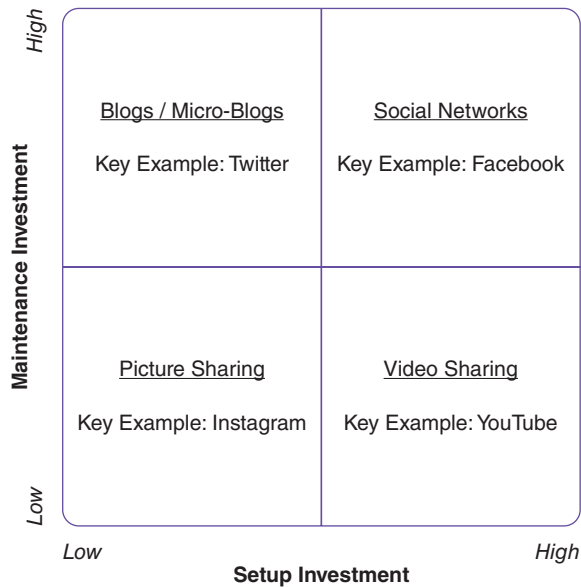


Figure 3.8 Investing in social media

Source: Reproduced from Mills and Plangger, 2015, p. 530

Activity 3.2 Explore the Cost of Social Media

1. Set up a professional Twitter account that represents your future work identity.
2. How much time does it take (keep a note of the minutes and hours) to set up a complete account?
3. Respond to all comments and followers over a 21-day period.
4. How much time does it take (again note the total time) to respond to comments?

3.9 SOCIAL MEDIA ADVERTISING

Social media advertising or social media marketing is placing advertisements inside social media networks. (See section 3.6.3 Pay per click (PPC) or search engine marketing (SEM).)

In annual reports presented as legal documents to the New York Stock Exchange, both Facebook (Facebook Inc., 2016) and Twitter (Twitter Inc., 2017) have stated that advertising is their main method of income generation and Facebook has commented in various annual reports that advertising accounts for over 90% of its income. Advertising is widely available on most social media platforms.

3.9.1 WHY IS SOCIAL MEDIA ADVERTISING USED?

There are two main reasons for the use of and growth in social media advertising: (a) the move to proactive ads; and (b) algorithm change.

The move to proactive ads

Firstly, when social media networks started introducing adverts in 2005 with the launch of Facebook ads, they provided an opportunity to reactively target people. Previously, pay per click targeted people when searching for a specific term, whereas social media advertising allows organisations to proactively target people who might not have considered the product or service. For example, it is possible to create adverts for:

- Women who were recently engaged, living within 50 miles of New York
- Students attending the University of Derby
- Couples who have moved to a new house in the last year

This is all due to the wealth of data that we share with the social media networks.

Algorithm change

The second reason is that you might have managed a Facebook page aimed at students attending the University of Derby with 25,000 likes and when you shared a post at least 15,000 of your fans saw this. This all changed in 2014 when Facebook decided to limit posts to fans, under the guise of 'reducing overly promotional page posts in news feed' (Facebook, 2014). This change in algorithm meant that this dropped overnight from 15,000 to fewer than 250 people, in some cases fewer than 50 people. Whilst social media networks don't charge organisations to use Facebook, if they want to promote their content, generally they now need to pay for adverts.

The growth of online adverts

As a result of this laser-focused targeting, many companies are moving their advertising from traditional print advertising to online and social media advertising.

According to the Advertising Association, the greatest change was in 2016 as total UK ad spend grew to £21.4 billion, with online spending up by 13.4% to £10.3bn, that's 48% of the total being spent across the UK. The remaining 52% is spent on TV ads, newspaper ads, direct mail, out of home (typically poster sites), magazines and radio (Advertising Association, 2017).

3.9.2 DISADVANTAGES OF SOCIAL MEDIA ADVERTISING

Whilst social media advertising proactively targets individuals based on their profile and the depth of personal data, an initial disadvantage was that it only targeted

platform users, i.e. those who signed up to platforms such as Facebook. However, this is changing as Facebook offers advertisers access to the 'Facebook Display Network', which includes websites outside Facebook, so that advertisers can promote their goods and services to a wider audience.

Another disadvantage is that the adverts on platforms such as Facebook may possibly target your existing customers. Imagine sending a special offer for a holiday to an existing customer who has just paid more, for the same holiday, by going direct to the company's website! However, it is possible to upload your customer database and exclude current customers from advertising campaigns. This often takes place with email matching, but be aware that this depends on the email address used with your business as well as on Facebook – many people have far more than one email address!

3.9.3 SOCIAL MEDIA ADVERTISING BIDDING OPTIONS

Similar to PPC, social media adverts are paid for on an auction basis. This means that the price you pay for an advert today may change in an hour's time. These changes take place in real time and are based on the number of advertisers wanting to talk to your target audience. The main methods of advertising on social media are:

- Cost per thousand (CPM)
- Cost per click (CPC)
- Cost per action (CPA)
- Cost per view (CPV)
- Cost per follow (CPF)

We looked at most of these methods in section 3.6.3 above. An important additional one to consider here is cost per follow (CPF).

Cost per follow (CPF)

Many organisations are focused on the number of fans, likes and followers they have. This is because it looks good! A group of managing directors meet and chat about who has the largest number of followers. I'd call this a vanity metric; it's nice, but doesn't mean anything because your followers may not see your content – unless you use social media advertising. See 'Algorithm change' in section 3.9.1 to understand why.

To respond to this, social media platforms encourage organisations to buy followers. An existing piece of content, such as a post that has performed well, can be used as the advert. This means it looks less promotional and has already been tested with a wider audience. The posts are shown again to the target audience and you only pay when someone clicks on the 'follow' or 'like' button.

One disadvantage of the cost per follow system is that there is no refund if you lose followers and fans during the campaign. And beware! If you do buy followers, do it the legitimate way, through the social media platform.

Video within social media is growing as a marketing tool, with younger generations watching only video instead of terrestrial TV. The University of Oxford and Reuters Institute have reported that there is a decline in the amount of time young people spend watching television (Nielsen and Sambrook, 2016).

As video is becoming omnipresent it is already available on many platforms. There are reasons for the growth of video and its importance in social media advertising. The world has seen a dramatic increase in the use of smartphones. Smartphone ownership is expected to reach 2.87 billion by 2020 (Statista, 2017a) and considering the worldwide population is 7.5 billion, that represents nearly 40% of people in the world. Ownership is much higher in some countries, like the United States where it's 95% (Pew Research Center, 2017).

Snapchat changed the way video was watched, with its focus being vertical viewing, rather than having to tilt a phone. Another reason for the growth in video is the increase in 'snackable content' (see Key Term).

KEY TERM SNACKABLE CONTENT

Snackable content is short and attention-grabbing. Friedmann (2010, p. 307) explained it as 'dispensable, instantly gratifying media content that is not just scaled down but maybe different in style and flavour'. It has been further described as short-form and catchy content (Martin, 2014; Giliberti, 2016).

Use of data

Table 3.5 gave examples of personal data available via social media pages and there are safeguards in place to ensure the data is aggregated, which means advertisers can target groups of people. It is important that specific individuals cannot be targeted for negative or malicious purposes.

Based on previous experience, such as identifying and negatively targeting specific individuals, Facebook understands potential problems around advertising based on targeted data. It also enables users to manage which advertising messages they see from brands and has introduced the ability to 'hide messages like this'. When this is selected, Facebook asks users to 'help us understand what's happening' and probes with a further question 'why don't you want to see this?', which enables a tick box with options including:

- It's not relevant to me.
- I keep seeing this.
- It's offensive or inappropriate.

This contributes towards a 'relevance score' for brands, so they can better understand what does and does not work within their targeted advertising on social media.

In Adverts Manager, brands can look at their relevance score, on a 1 to 10 scale, with 1 being low. The lower the relevance score, the more expensive your adverts are likely to be as they are less appealing to users.

Activity 3.3 Digital Marketing Toolbox Analysis

For an organisation of your choice, review the different elements of their current digital marketing toolbox and make recommendations for changes.

See Template online: Application of the digital marketing toolbox

FURTHER EXERCISES

1. Construct a planned email to promote a new computer game or fashion accessory being launched next month. The email is aimed at an existing customer base and should include perceived content value for the receiver.
2. Using one of the blog tools described in this chapter, start a blog! Write a post every week and see if others will contribute content.
3. Select a video of your choice in YouTube. Watch the video several times and based on this create an SEO plan to make the video more visible in search results. Your SEO plan should address several of these elements: keywords, video tags, title, description, proposed thumbnail, video transcript.

SUMMARY

This chapter has explored:

- The critical factors that make email work.
- How Hofacker's 5 stages of information processing can evaluate websites.
- Key changes to online PR, from citizen journalists to fake news.
- The differences between search engine optimisation and search engine marketing and what makes online ads successful.
- Why organisations create blogs, and elements to consider when starting a blog.
- The benefits and building blocks of social media networks and the bidding options on social media advertising.

4

CONTENT MARKETING

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

Understand the importance of long-tail keywords

Apply content marketing goals

Analyse paid, owned, shared and earned media

Evaluate content marketing

Create a content marketing strategy

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Identify and recommend long-tail keywords
- Create a content marketing strategy
- Construct a realistic persona

4.1 INTRODUCTION

Content marketing is a cornerstone of all digital marketing. Whether it is words, photos, infographics or video, it is critical that organisations understand the strategic role of content. Content can increase brand visibility, drive traffic to websites, help educate and convert customers. Whilst not a new idea, valuable content can be charged for and is more likely to be shared.

From reading this chapter you will understand how content marketing started and comprehend what is involved in creating a content marketing strategy. At the end of the chapter you will be able to create distinct personas so that your target audience is focused, which is more likely to increase traffic to your site.

4.2 WHAT IS CONTENT MARKETING?

In 1996, founder of Microsoft Bill Gates wrote an essay where he said, ‘content is where I expect much of the real money will be made on the Internet, just as it was in broadcasting’ (Gates, 1996). This had been a recurring theme within the entertainment sector and content is recognised as a cornerstone of all digital marketing; from website copy to YouTube storyboards; from white papers to Twitter posts, it all requires diverse types of content. This is known as **content marketing** (see Key Term).

KEY TERM CONTENT MARKETING

The Content Marketing Institute defines content marketing as:

a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly-defined audience — and, ultimately, to drive profitable customer action. (Content Marketing Institute, n.d.)

As the Content Marketing Institute suggested, the purpose of creating compelling content, on a consistent basis, is to attract, convert and retain customers. This has been described as thinking and acting like a publisher.

4.2.1 WHAT CONTENT DOES

Essentially, content functions in a multitude of ways:

Content increases brand visibility

Instead of reading a sales pitch, customers or potential customers may be reading an article that provides advice or guidance, promoting the brand in different areas outside its corporate website or traditional locations.

Content helps create backlinks for search engine optimisation (SEO)

Good articles are often recycled by other people online. Have you ever quoted an article or added a link back to a page about a certain subject? By adding someone else's article to your web page, you are creating a backlink that Google sees and it acknowledges that the original content must have value to be added to another website.

Content encourages conversion rate optimisation (CRO)

Clever content such as buying guides can convert browsers into buyers. If you are visiting online retailers such as Sears in the United States or John Lewis in the UK, you will notice with more expensive goods, such as those in their large appliance category, they offer 'buying guides'. This free online advice offers useful information before a purchase takes place. A well-written guide can convert browsers into buyers and offer greater reassurance about the company's expertise.

Content inspires social shares

Have you ever shared an article on Twitter? Retweeted, liked or commented on content created by someone else? Content can inspire social shares, especially where the content is vivid and interactive (see below, Key Terms – **vividness and interactivity** on p. 123). Digital tools make it easy to share content across social channels (see Digital Tool: Buffer).

Ethical Insights Content Farms

Google is constantly changing its algorithm and previously rewarded up-to-date and new content on websites. The challenge was that organisations started to gamify their content and used **content farms** to provide a steady stream of new content.

Content farms are companies that employ many freelance writers to create copy that works for search engine optimisation (SEO) purposes. Its aim is purely to be found and registered on search engines. The content was typically short (fewer than 300 words), generic and of low quality; however, it ticked the box for regular and recent content.

Many organisations use the free version of Google Analytics, effectively sharing their data with Google. Whilst there were increased amounts of content, bounce rates were increasing (for more on Google Analytics terminology, see Chapter 13, Digital Marketing Metrics, Analytics and Reporting), so people searching were finding a page that seemed relevant, but leaving the page instantly. In 2011 Google changed its algorithm to discourage this practice with the update known as Panda. Panda reduced visibility in search engine results pages for low-quality content that was typically created by content farms.

Content optimises the website for long-tail keywords

As our online search behaviour has become more complex, we are searching for more specific phrases. Content within blog articles, how-to guides or online reviews, can build in these specific search phrases, that are less likely to appear on other websites.

Digital Tool Buffer

Buffer is a digital publishing tool that allows you to find, share and publish content across different social platforms.

It has a free account as well as paid-for options and is an easy way to share content online.

- See <https://buffer.com>

KEY TERM LONG-TAIL KEYWORDS

A long-tail keyword (or key phrase) is a longer set of words. Instead of searching for a single word or phrase, we build a much longer tail. For example, my search is likely to expand with each step, as shown in Figure 4.1.

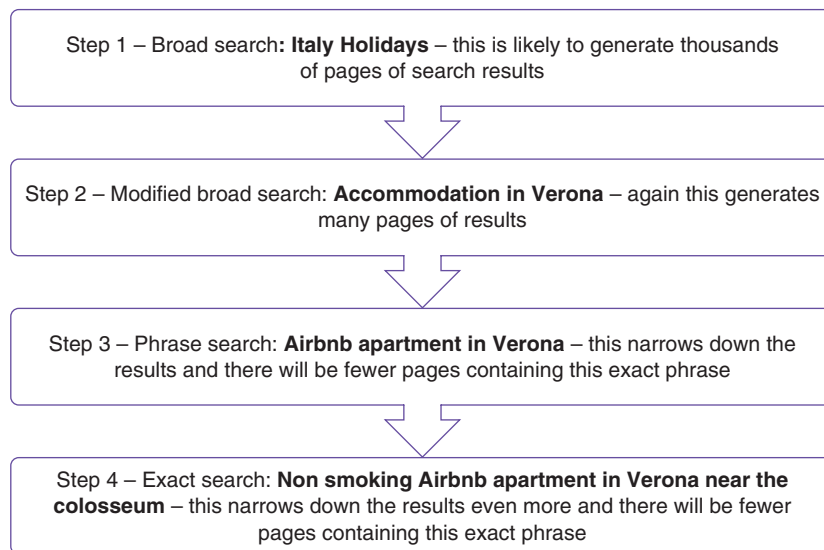


Figure 4.1 From keyword to long-tail keyword

Step 4 in the figure represents the set of long-tail keywords, and as you can see this is nearly a sentence. Any website containing this phrase is more likely to appear at the top of the search engine results page (see Chapter 3, The Digital Marketing Toolbox, section 3.6 Search engines).

Content generates new customers and retains current customers

Creative content can be found by new customers who are unaware of the organisation. It may be that someone searches for a specific phrase and finds the organisation for

the first time. Imagine you've just started university and you're searching for 'reliable taxi firms'. It's likely that you will find a list based on your location. You will find recommendations that may include firms you were totally unaware of.

In the same way, an existing customer might decide to check some information and find the current organisation, which provides reassurance that they have made the right choice. After finishing your second year at university you might search for 'late night taxi firms' and discover the taxi company you previously used. These search results appear owing to content on the taxi company's website, reviews passengers have left or other online content.

DISCOVER MORE ON CONTENT MARKETING KEY STATS

Visit these webpages for more information on the latest content marketing statistics:

- curata.com/blog/content-marketing-statistics-the-ultimate-list
- contentmarketinginstitute.com/2017/10/stats-invest-content-marketing

4.3 HISTORY OF CONTENT MARKETING

It may seem that content marketing is a new phenomenon but the concept of brands telling stories to attract and retain customers is not new; they have been doing this for centuries. More than 100 years ago firms used content, albeit different types, with the aim of increasing business and revenue, like the example shown of John Deere in Case Example 4.1, which was originally shared with me by Karen Jones at Aston University.

The John Deere case example takes you back through history where content was used for educational purposes, and marketers continue to use online content to educate and entertain their audiences to drive traffic and conversions.

Case Example 4.1 John Deere

In 1895 John Deere launched *The Furrow* magazine in the United States. The content featured in *The Furrow* was educational, and it focused on teaching farmers how to be more fruitful business owners, rather than trying to sell John Deere's farm equipment.

Over 120 years later, *The Furrow* is still alive and well, with five editorial teams publishing their respective versions of the magazine in North America, Europe, South America, Australia/New Zealand

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and China, creating their content in 15 languages. The 2017 global circulation of the magazine was approximately 1.5 million, of which the European magazine totalled 770,000.

The editorial team based in Mannheim, Germany, publishes 14 different country editions of the magazine and each has its own, country-specific editorial content and advertising material.



Figure 4.2 The Furrow Russian edition

Source: Reproduced by kind permission of John Deere GmbH & Co. KG

Thanks to Steve Mitchell and Steven Roller, Manager, Company Magazine, John Deere GmbH & Co. KG, for key facts on John Deere.

Case Questions

- Can you think of an organisation that publishes in multiple locations and several languages?
- What are their challenges in maintaining brand image and tone of voice across different countries?
- How would you recommend this is managed?

4.4 CONTENT MARKETING STRATEGY

Organisations may have business strategies, marketing strategies and product strategies. In a digital environment where content is such a valuable resource, it is necessary to adopt a content marketing strategy, to recognise the place of content within the organisation.

Content has always existed, whether that was product or promotional content. However, this was largely controlled by the organisation, issued to a schedule and distributed to a specific audience. The difference with a content marketing strategy is that it adopts a longer-term view of what's needed, for whom, why and how it will be evaluated.

There are few academic articles about content marketing strategy and the industry experts are the Content Marketing Institute (CMI), who focus on content marketing education and training. They created a Content Marketing Strategy Framework, which has been tested on many brands. This is outlined in Table 4.1 and we will review the framework further in this section.

Table 4.1 Content Marketing Strategy Framework

Framework element	What this means
1. Purpose and goals	Why are you creating content and what value will it provide?
2. Audience	For whom are you creating content and how will they benefit?
3. Story	What specific, unique, and valuable ideas will you build your content assets around?
4. Process	How will you structure and manage your operations to activate your plans?
5. Measurement	How will you gauge performance and continually optimize your efforts?

Source: Content Marketing Institute, 2017, p. 2

4.4.1 CONTENT PURPOSE AND GOALS

Creating content for an organisation without a purpose or goal wastes time and effort. In all aspects of business we like to have clear objectives, and Juan-Carlos Molleda, writing in the *Journal of Communication Management*, suggested the idea of an authenticity index. He provided an outline (Molleda, 2010, pp. 232–3) for messages or other communications from an organisation which was based on a growing need for greater authenticity in corporate communication. We could argue that he was seeking to identify the purpose of content and how this aligned with an organisation's mission and values. Taking Molleda's proposed list of elements to consider, we could apply this to content goals and consider this a list of potential reasons for creating content. I have adapted this as a blueprint in Table 4.2, along with content from the CMI on possible goals, with some examples of the possible content.

Table 4.2 Content purpose blueprint

Possible goals	Content examples
Create imagery of or claims that evoke pleasure or fun when visitors encounter the corporate offering	Images, words, video
Share access to original ideas or designs	Behind the scenes, blueprints, shared reports
Demonstrate organisational values, including beliefs, principles, or way of acting or operating	Content from the CEO such as published letters or videos, blog posts, annual reports, shareholder meeting content
Highlight associations with originality in design of products, services, ideas, or facilities; exceptional quality of corporate offerings	Trademarks, patents, brand story-telling, product articles, product hero features, examples of exceptional customer service
Showcase the heritage of the organisation and its leaders, or references to historical background	Brand story-telling, imagery, videos, product development and evolution, links to working practices
Explain the sustainability and corporate responsibility programmes, decisions, or actions	Videos showing examples of the corporate social responsibility programme
Generate customer acquisition, conversion or retention	Focused content relating to the desired behaviour, such as emails containing a time-limited offer
Save costs through better targeting	Focused content based on the audience group, such as emailing offers to students towards the end of term when money is in short supply!

Source: Adapted from Molleda, 2010, pp. 232–3

The content purpose blueprint provides a starting point to create goals that may need to be adapted based on the organisation.

4.4.2 AUDIENCE PERSONAS

When creating content, it is essential to consider the audience. In a digital environment we narrow the audience into personas, ‘representations of archetypical users; they bring “people to life” in the minds of the people who use them’ (Hendriks and Peelen, 2013, p. 60). They are used by businesses to create content, build websites and develop advertising messages.

Why bother with personas?

As researcher Salvatore Parise observed, ‘customer personas enable organizations to view and see their products and services from the customer perspective’ (Parise et al., 2016, p. 416). His comment is especially valid when younger staff are creating content for older customer groups. Imagine you’re 20 or 21 and you’re writing a blog article aimed at a wealthy couple in their sixties. It’s a stretch. As a student, you may be on a budget and you have no idea of the challenges faced by older people. That’s where personas are invaluable, allowing you to step into the shoes of the customer.

How do you create a persona?

The first step is to collect and analyse data about the target customer groups. The data should be genuine and you can start with secondary research as this can happen at your desk – it's quicker and cheaper. After this you may seek primary data, which takes longer to organise and often requires an investment.

From the data you should extract and start to identify patterns of behaviour to describe different 'types' of user. Typically digital personas are based on three elements, as shown in Table 4.3, which also suggests examples of data sources (and see also Discover More on Demographic Research Sources).

Table 4.3 Digital persona elements

Persona element	What this means	Data source
Demographics	Age, gender, income, education, ethnicity, marital status, household (or business) size, geographical location, occupation	Mintel, Keynote, government data, sales data, in-house metrics and shopping statistics
Psychographics	Personality and emotionally based behaviour linked to buying habits, purchase choices, attitudes, beliefs, lifestyle, hobbies, holidays, values	Mintel, Keynote, government data showing hobbies and interests
Webographics	Internet usage, social media usage, websites visited, browsers used, devices and systems used, time of day and duration online, action on site (downloads, comments, likes), other media used	Online data sources such as Statista, Pew Internet, Google Analytics or offsite analytics, interviews and observation sessions with existing and potential users, user testing sessions

DISCOVER MORE ON DEMOGRAPHIC RESEARCH SOURCES

Many government bodies worldwide capture statistics that are free to access. This includes the following:

- The Office for National Statistics is 'the recognised national statistical institute of the UK' and their website contains statistics from leisure and finance to education and well-being. See www.ons.gov.uk.
- The European Union gathers data from across Europe from country profiles to population details. See https://ec.europa.eu/info/statistics_en.
- The United Nations statistics division gathers and assembles worldwide demographic data. See <https://unstats.un.org/home>.
- The United Nations also provides links to National Statistical Offices' websites which cover Africa, Americas, Asia, Europe and Oceania. See https://unstats.un.org/home/nso_sites.

Digital Tool Online Persona Builder

The team at Hubspot, the online software company, has created an online persona builder. It takes you through a series of questions and, at the end, your persona is created. It is fairly basic, but a good place to start.

- Visit www.makemypersona.com

Activity 4.1 Construct a Digital Persona

1. For an organisation of your choice, construct a digital persona.
2. Conduct some research to identify data about the target audience and distil key demographic and psychographic features.
3. Based on additional research, propose webographic characteristics.
4. Provide an appropriate name and provide a suitable image to support a realistic persona.

4.4.3 CONTENT CREATION

All content tells a story – whether that's an image, a video or blog post. Once the goals have been agreed and personas created, you can map out potential stories for the audience.

Stories can be about the organisation, its products and services or share knowledge and expertise. Table 4.4 shows the Storybox Selection™, with many ideas for content creation.

Table 4.4 Storybox Selection™

The organisation	Products and services	Knowledge and expertise
<ul style="list-style-type: none"> • Organisational values • The heritage of the organisation • Corporate responsibility • Company achievements • Milestones and highlights • Quality assurance • The team • Team and employee achievements 	<ul style="list-style-type: none"> • The products, services • Original ideas or designs • How the product or service evolved • Behind the scenes • The market covered • Customer stories • Customer success • Educational stories 	<ul style="list-style-type: none"> • Research and opinions • Surveys • Conference feedback • Forecasting the future • Resources • Reading list • Templates • Point of view • FAQs

Curata, a content software company, created the Content Marketing Pyramid showing the effort required and frequency of content creation. At the top of the pyramid, shown in Figure 4.3, there is considerable effort in developing research papers and books. At the other end of the scale they suggest social media posts and curated content (Curata, 2017), which requires less effort and can be used more frequently (see Key Term – **content curation**).

KEY TERM CONTENT CURATION

Curated content or the process of content curation has been described by researchers Aristeia Fotopoulou and Nick Couldry from Goldsmiths College, University of London, as ‘finding, categorizing and organizing relevant online content on specific issues’ (Fotopoulou and Couldry, 2015, p. 243).

Content curation can be a useful way of creating content on specific themes such as product reviews, where you are telling the story about the story. As an example, you may curate content by gathering up a series of articles written about Snapchat Specs, assessing the different perspectives and range of advice provided and turning this into a post for your blog.

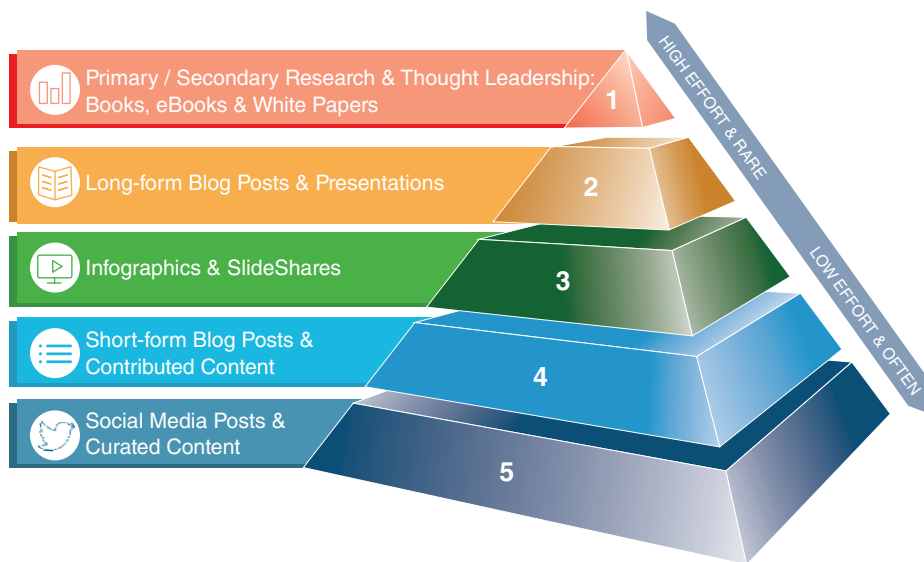


Figure 4.3 The Content Marketing Pyramid

Source: www.curata.com

Having considered the subject of the story, there are many content types available which can be based around the content length or structure, which we will now consider.

Content length

Content length refers to short- and long-form, which is about the number of words in the article or the number of seconds that the video runs.

Short-form content has been described as twitterature, nanofiction (Rudin, 2011) and casual viewing (Snickars and Vonderau, 2009). Several news and marketing publications such as *Marketing Week* and the *New York Times* have called this short content ‘quick break’ or ‘snackable’ (Alter, 2015; Dreier, 2016; *Marketing Week*, 2016). This has been driven by two key factors; firstly, the growth of mobile phones, where many people consume video and shorter content, and secondly, the reduced cost in video and content production.

Long-form content, also labelled as long-form narratives or in-depth content, includes blog articles, white papers, case studies, e-books and longer videos.

Based on the behaviour wanted, there are strategic content building blocks you can select. Figure 4.4 shows comprehensive content options for achieving awareness. This is needed when launching a new brand or product and trying to improve brand awareness.

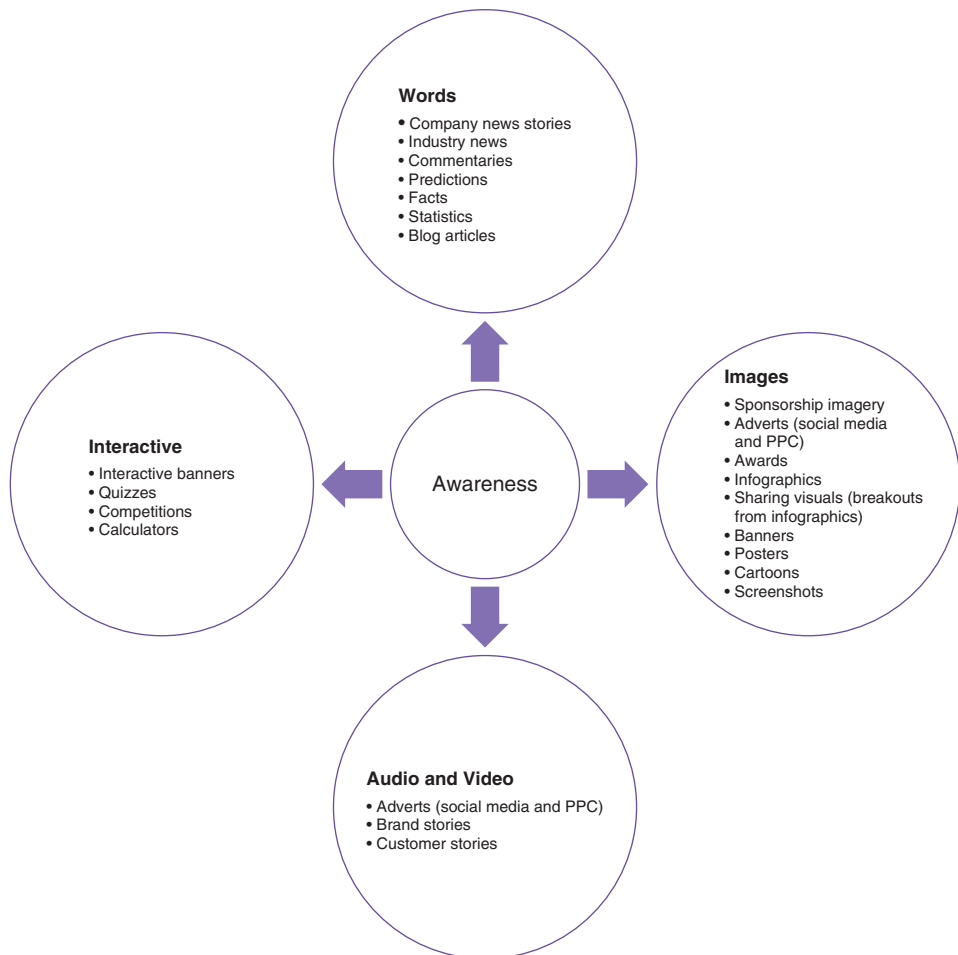


Figure 4.4 Strategic content building blocks for awareness

The critical factor to remember is that content is not all about words! Images, audio and video have become increasingly important as Google has invested in image and voice search. An example of using an image to create awareness is shown in Figure 4.5. A small brewery in Ireland, Kelly's Mountain Brew, is using a dramatic image posted to Facebook and Instagram and focusing on the theme of the rugby world cup, which was taking place at the time.



Figure 4.5 Example of image used for brand awareness

Source: kellysmountainbrew.com

Once awareness has been achieved, the next stage is conversion. We have made the target audience aware of the product or service and we would like them to take the next step and convert. This may involve a purchase or sharing data such as an email address. Conversion requires different content options, such as those shown in Figure 4.6.

Conversion content is often about providing additional reassurance information at the stage where a potential customer may be deciding whether to go ahead or not. One example of conversion content is reviews. On business-to-business websites these may be testimonials.

Conversion	Words	Time-limited offers	
		Product descriptions	
		Product comparisons	
		Polls and surveys	
		Brochures	
		Wikis	
		White papers	
		Research reports	
		General reviews	
		Product reviews	
		Third-party articles	
		Endorsements	
		Case studies	
		Interviews	
		Testimonials	
		Quotes	
		Social media posts	
		Forum messages	
		Buying guides	
		How to guides	
		Lists	
		Q&A	
		Templates	
		Messaging	
		Images	Product images
			Diagrams
			Illustrations
			SlideShare decks
			Animotos
		Audio and Video	Animated GIFs
			Podcasts
			Video storytelling
			Live streaming
			Online demos
	Interactive	Apps	
		Calculators	
		Live chat	

Figure 4.6 Strategic content building blocks for conversion

Once awareness and conversion have been achieved, the organisation has gathered some data or a sale has taken place, enabling a direct conversation between the organisation and the customer.

The next step is to retain the customer and different content options are shown in Figure 4.7. It is worth noting that whilst there are fewer options at this stage, you now have the customer's details! This means that behaviour in terms of opening emails, responding to emails or offers, can be measured and recorded. As a result, better-focused content can be created.

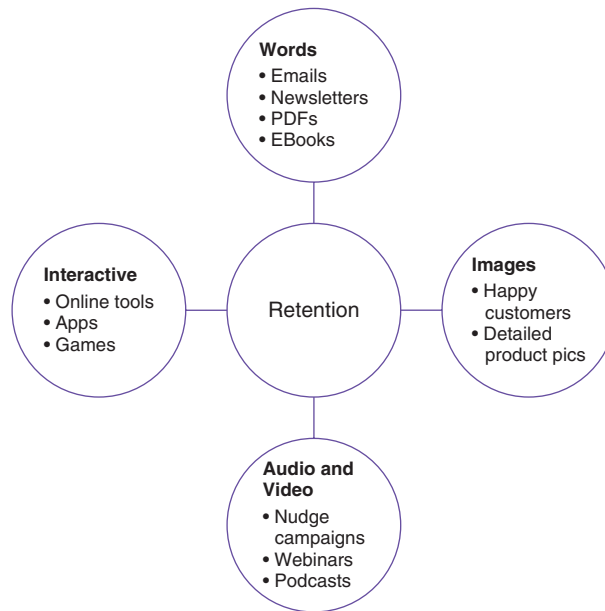


Figure 4.7 Strategic content building blocks for retention

Macmillan Cancer Support organises many different fundraising activities, one of which that is popular in UK universities is its World's Biggest Coffee Mornings. Cakes are baked and sold to raise money. The event has taken place for many years and a dedicated landing page on the website provides an app that enables those participating to create personalised invites and posters, as well as thanking those who participated, using an interactive online tool, which you can access at <https://be.macmillan.org.uk/be/DesignEditor.aspx?sectionId=456>.

Content structure

The structure of content and how and when it is shared, is connected to the timing of specific types of content. There are three specific types of content to consider: evergreen, planned and topical, which are explained here.

Evergreen content is also called 'flow' content; it can be used at any moment because it is not time-sensitive. This can be planned and prepared many months in advance, plus it can be recycled and used again at different times. Examples of this include a fashion retailer posting '5 things to consider when selecting a winter coat' or an IT services company sharing '3 ways to save money on IT infrastructure'.

Planned content refers to scheduled events that are in the country's or the organisation's annual calendar. This includes content from seasonal events, festivals, product launches, shareholder meetings. The benefit of planned content is that organisations have time to prepare and develop the relevant format. The fashion retailer can share 'what we discovered at Paris fashion week' and the IT services company may provide more details to 'learn about Microsoft's new programmes'.

Topical content refers to newsworthy items, which are often indicated as #breaking on Twitter. These stories cannot be prepared in advance and require responses as they occur. When stories occur there is a decision to be made as to whether a response is relevant and right for their audience. Not all situations require a response and this should be considered within the PR team.

4.4.4 CONTENT MANAGEMENT PROCESS

The CMI states that ‘content marketing is an ongoing operation, not a short-term campaign’ (Content Marketing Institute, 2017, p. 14) which means that to run a content strategy requires clear direction as to the different people involved, as well as the technology to support the content delivery. The aspects of content management process are listed below:

- Themes for the year
- Content calendar
- Content guidelines
- Content creation and editing
- Publish/schedule
- Distribute and promote
- Review

Themes for the year

Annual themes can be focused on product launches, the organisation’s own events as well as wider national or international events where relevant. Developing themes can take place by understanding persona needs or with keyword research using keyword tools (see Smartphone Sixty Seconds™ – Free keyword research tools) and should be added to the **content calendar** (see Key Term).

Smartphone Sixty Seconds® – Free Keyword Research Tools

- On your mobile phone go online and search for ‘free keyword research tools’.
- Select one of the tools that is free.
- Add a keyword or web address and explore the results.

Content calendar

Content creation is often planned and managed within a **content calendar** (see Key Term), which allows digital marketers to:

- Plan content around key events in the industry or important dates

- See where there are gaps in your content plan, with plenty of warning to create more content
- Make sure the content is ready in plenty of time

When working in an organisation, the further ahead you plan your digital content, the better placed you are to produce a consistent flow of content, that builds the brand's perceived expertise in your chosen subject areas.

It also means you can explore the year ahead and identify relevant industry or world events that you wish to plan content around. Content can be planned on a daily, weekly, monthly, or quarterly basis depending on the industry sector.

KEY TERM CONTENT CALENDAR

A Content Calendar is a shareable resource that marketing teams can use to plan all content marketing activity.

It is often in a spreadsheet, divided by month, that is shared in Google Docs or OneDrive, so that the latest version is always available.

The benefit of using the calendar format (rather than just a long list of content to be published) is that you can visualise how your content is distributed throughout the year.

Content guidelines

Typically content guidelines include details about the editorial style and brand voice. Larger organisations have instructions on use of abbreviations and grammatical norms, such as the use of active or passive voice.

This may include the use of templates to ensure everyone includes at least one image in a blog post and specific keywords.

It is important that the guidelines are created, shared and understood from the start so that content created by anyone in the organisation follows the same style.

Content creation and editing

Once content has been created, you can edit and include additional items such as links to earlier content, links to content outside the website, new or relevant information. When content is edited, Google sees this as a signal that the content is important enough to be revisited and reviewed. This indicates that it is quality content and it is often re-indexed after editing.

Publish or schedule

When the content is ready you may decide to publish immediately or schedule for a later date. The benefit of a content calendar is that several key items can be prepared and scheduled in advance. This can be useful if the organisation has a specific time of year that's especially busy.

Blog posts are often created using blogging tools such as Blogger or Wordpress, which incorporate ‘publish now’ or ‘schedule later’ functions (for more on blogging see Chapter 3, The Digital Marketing Toolbox).

Distribute and promote

Simply uploading a blog post, video or infographic is not enough to gain attention. The distribution needs to be carefully planned and is likely to include:

- Abbreviated headline shared on Twitter
- Alternative headline posted on LinkedIn
- Limited content added to LinkedIn
- Relevant images added to Instagram
- Being included in a newsletter that is mailed to your contact list

Some distribution tools can make achieving coverage across several social media platforms faster and easier (see above, Digital Tool: Buffer).

Content review

Over time some content may become irrelevant or dated and may need to be removed completely. It is worth reviewing low-performing content, such as pages, posts or videos with few likes, shares or views and deciding whether to edit or remove.

4.4.5 CONTENT MEASUREMENT

Content metrics should be based around the original goals and objectives. Looking back at the content purpose blueprint in Table 4.5, I have adapted this to include relevant metrics for each goal in Table 4.5.

Table 4.5 Content purpose blueprint and metrics

Possible goals	Metrics
Create imagery of or claims that evoke pleasure or fun when visitors encounter the corporate offering	Number of views, visits, downloads, shares
Share access to original ideas or designs	Number of views, visits, downloads, shares, sentiment, forwarding, back links (see Key Term – sentiment analysis in Chapter 3)
Demonstrate organisational values, including beliefs, principles, or way of acting or operating	Number of views, visits, shares, sentiment
Highlight associations with originality in design of products, services, ideas, or facilities; exceptional quality of corporate offerings	Number of views, visits, shares, sentiment
Showcase the heritage of the organisation and its leaders, or references to historical background	Number of views, visits, shares, sentiment
Explain the sustainability and corporate responsibility programmes, decisions, or actions	Number of views, visits, shares, sentiment

Possible goals	Metrics
Generate customer acquisition, conversion or retention	Completed forms, subscribers, comments, number of new customers, increase in sales revenue
Save costs through better targeting	Reduced costs

Source: Adapted from Molleda, 2010, pp. 232–3

4.5 WHO CREATES THE CONTENT?

Who creates the content is an interesting issue. It could be created in-house by the company, through external agencies and by customers. One useful framework to consider the different sources of content is the POEM model, which was created by Sean Corcoran whilst working at the research firm Forrester (Corcoran, 2009). POEM describes three types of media, rather than content, which Corcoran named Paid, Owned, Earned Media.

I have adapted this to include *shared*, as companies never own their social media space, nor can they control exactly who sees what content, so it is always under the owner's control.

4.5.1 PAID, OWNED, EARNED AND SHARED MEDIA

I have re-framed the model as Paid, Owned, Shared, Earned (POSE) media and the amended model is shown in Figure 4.8. Let's look at each of the elements.

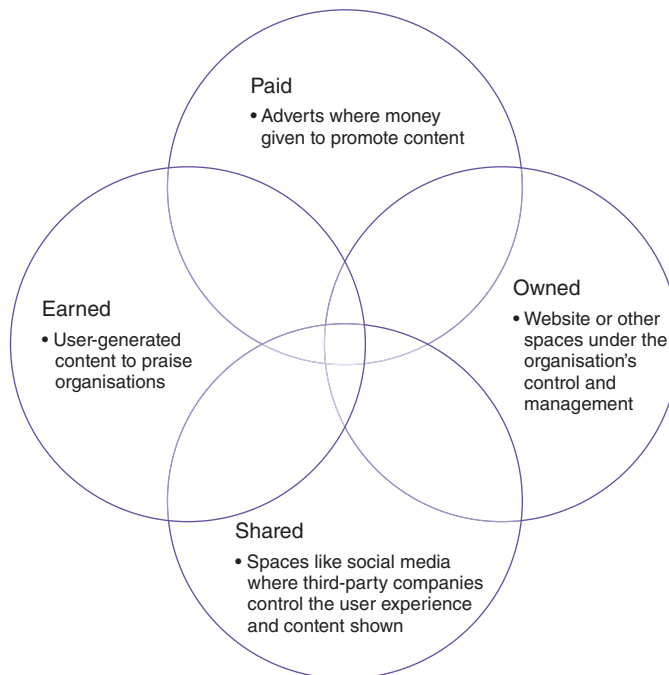


Figure 4.8 Paid, owned, shared, earned (POSE) media model

Source: Adapted from Corcoran, 2009

Paid – Bought media

Content that the organisation has bought to place, such as adverts (whether this is via pay per click or on social media), is in this category. It may include sponsored posts and has grown, based on the ability to target specific user groups. Corcoran defined paid media as where the 'brand pays to leverage a channel'.

The critical factor about paid media is that it has been created by the organisation who intend to use it for promotional or other purposes. Paid media can be easily ignored by customers who dismiss adverts and other corporate communications as they are perceived to be less authentic. As Sonja Gensler and her fellow researchers noted: 'Ad viewers perceive unsolicited consumer-generated ads as authentic but not credible, while they perceive consumer-generated ads created within a contest as credible but not authentic' (Gensler et al., 2013, p. 246).

Paid media can also include content from influencers who are given rewards, which could include payment or goods, in return for positive content about the organisation and its offers (see Case Example 1.1, Eltoria Influencer Marketing).

Owned – Controlled media

When the content is controlled and managed directly by the organisation, such as their websites and email communications, this is owned media. Ironically, as the organisation owns and controls this media it is considered less authentic by customers.

Shared – Borrowed media

Where content is placed on third-party sites, such as social media platforms, organisations are sharing someone else's platform. This a new addition to the model and is based on social media sites such as Facebook who are showing users less and less commercial content. In some cases, the only way that users see commercial content is if it is sponsored or paid for.

Earned – Won media

Where content is created by customers, fans and sometimes unhappy customers who are seeking resolution to a situation, Corcoran suggested that earned media was 'when customers become the channel'.

At a basic level, earned media could be considered as positive content in the form of retweets and likes. This extends into longer-form content, such as parody videos and appreciation pages.

The critical factor is that earned media is often outside the control of organisations and is the content that users, whether customers, fans or detractors, prepare and share amongst their networks. Whilst Corcoran named this 'earned media', this is often recognised under the alternative title of **user-generated content**, which is often abbreviated to UGC (see Key Term below).

The POSE model does cross over the defined segments, as shown in Figure 4.8. These are the areas where difficulties can occur, as celebrities have endorsed specific products without disclosing payment!

User-generated or user-created content

User-generated or user-created content (UGC or UCC) has always existed. Letters to the editor or product reviews are forms of UGC. We, the users, create the content and there is no single agreed definition of UGC or UCC.

KEY TERM USER-GENERATED CONTENT

Kevin Crowston and Isabelle Fagnot refer to user-generated content as ‘a form of voluntary organization’ (Crowston and Fagnot, 2018, p. 90).

An earlier definition of user-created content from the Organisation for Economic Co-operation and Development (OECD) defined it as content made publicly available over the internet

1. Which reflects a ‘certain amount of creative effort’
2. Which is ‘created outside of professional routines and practices’.

(OECD Directorate for Science, Technology and Industry, 2007, p. 4)

Further developing the concept of user-generated content (UGC), Kevin Crowston and Isabelle Fagnot suggested that the three key features of this content format were:

1. Large numbers of distributed contributors, commensurate with the popularity of the activity, ranging from dozens to tens of thousands or more;
2. Mostly unpaid contributions; and
3. Jointly-focused activity, in which contributors collectively develop new content (e.g., text, images or software) of value to a larger audience.

(Crowston and Fagnot, 2018, p. 90)

The common thread between these definitions is the effort or new content that is created. This factor enables sites like Wikipedia, TripAdvisor®, Facebook, Twitter and Instagram, to exist.

Another term for those participating in, or contributing user-generated content, is ‘produser’, defined as where ‘participants (become) users as well as producers of information and knowledge, or what I have come to call “produsers”’ (Bruns, 2006, p. 276).

User-generated content has recognised benefits and weaknesses for organisations. Advantages of user-generated content for organisations include: it often costs nothing to create (Vanden Bergh et al., 2011); search engine results are often based on user-generated content (Petty, 2012); and users’ actions in social media are shared with their networks, as well as across the brand pages (Colicev et al., 2016), and other consumers identify blog articles created by other users as more credible (Kim and Hanssens, 2017).

Disadvantages of user-generated content for organisations arise as the content is outside the organisation’s control (Vanden Bergh et al., 2011) and the content can be unpredictable – positive or negative (Kumar, Choi et al., 2016).

To explore whether your organisation has much user-generated content, you may need to conduct a content audit.

4.6 CONTENT AUDIT

A content audit or content inventory is the action of checking all the organisation's content online and compiling it into a large list. This takes place for two reasons: either (a) the need to check that the brand is consistent across a range of platforms or (b) for search engine optimisation analysis (see Chapter 3 for more on SEO).

Whatever the purpose, the activity can take some time and effort and needs to be carefully considered as to who will carry out the work, where the data will be stored and how the data will be used once gathered.

4.6.1 TYPES OF CONTENT AUDITS

There are three types of content audit that you can perform:

- Full content inventory
- Partial content inventory
- Content sample

Full content inventory

This is a large task and could take some weeks to perform as a full content inventory is a complete listing of every content item that can be found across the organisation's owned and earned media. This may include all pages as well as all assets (such as downloadable files and videos). This is normally required where a major review is taking place.

Partial content inventory

This is a listing of a subset of the organisation's owned and earned media. A partial inventory may include, for example, the top few levels of a website or the past six months of articles. You may be asked to undertake a partial content inventory when an organisation is checking consistency and simply needs a smaller number of items. Alternatively this takes place when it is not economically viable to review all content in a full inventory.

Content sample

This is a less detailed collection of example content from specific sources, such as a website. This is often requested based on a specific requirement, such as a new website.

If you are not sure whether an audit is needed, you can use the online template (Template: Ten-point content audit analysis) and watch this video, which shows you how to conduct a content audit: www.youtube.com/watch?v=ALU-1M_-jbg.

See Template online: Ten-point content audit analysis

Screaming Frog has created an SEO spider tool which will search the internet and list all pages with the domain name. There is a free and paid-for version that you can explore (go to www.screamingfrog.co.uk/seo-spider) and Curata, a content marketing software company, shares its free content audit templates (see www.curata.com/blog/content-audit-template).

4.7 CONTENT MANAGEMENT

Once a content audit has been conducted, you may wish to define how future content management takes place. My personal mantra is 'add one web page, remove two'. This can be difficult to achieve as content management requires careful planning, to consider what the organisation might publish during the year.

It is also critical to identify the people required to produce and deliver the content. This involves many different roles as the people in content management can include those working inside the organisation as well as others outside the organisation. PR companies often provide a copywriting service (as do copywriters). When hiring staff to create content, you may need to create a competency test to see who is best placed to create short- and long-form content for your organisation.

Other key factors in content management include content assets and content management systems. Let's explore each of these elements.

4.7.1 CONTENT ASSETS

When creating initial content, the assets need to be identified. Content assets may include photos and other imagery, videos, white papers, eBooks and other long-form written content available to the organisation.

It is essential to ensure your organisation only uses images that it has paid for, or has permission to use, in that format. There are many popular photo-sharing sites, but these may prohibit commercial use of the images. If you represent a commercial organisation and you are using these images, be prepared for a big fine or an out-of-court settlement.

4.7.2 CONTENT MANAGEMENT SYSTEMS

In terms of technology, websites often incorporate a content management system (CMS), which allows individuals to create and post content, to be published immediately or to be scheduled at a future date. The Open Source blogging and website programs such as WordPress, Joomla and Drupal usually include content management systems, allowing writers to add content and to build in keywords, images and meta descriptions.

An additional advantage with these websites is that they contain a media gallery. One method of managing assets is that a small team can upload only the imagery that has been pre-approved for use, or copyright recognised and paid for.

When the content has been created, there is the question of who has access. Questions to consider are:

- Is the content available to all?
- Is it member- or subscriber-only content?
- Is it paid-for content?

Content gating and paywalls

Some organisations manage their content by content-gating via paywalls (see Key Terms) to encourage non-customers to sign up or at least to share their email address, so the organisation can start a conversation about their requirements.

Paywalls are familiar to researchers and students, as academic articles are often available on a pay-per-item basis, unless your institution has a subscription to access the content.

KEY TERMS CONTENT GATING AND PAYWALLS

Content gating means hiding additional content behind a so-called wall, which is removed when the visitor has shared information, answered a question, or paid a fee.

Facebook requires a login to access more than the basic information, so users must create an account to view detailed material.

Paywalls are a type of content gate where payment is involved. Researchers have noted that visitor numbers drop when paywalls are introduced (Lambrecht et al., 2014), although the UK's main business newspaper, *The Financial Times*, introduced and has sustained its paywall since 2007. It has evolved from allowing a few free articles, to registration for a time-limited free trial.

Case Example 4.2 Tripadvisor® Content Gate

TripAdvisor® has realised its reviews are valuable, yet many of the site's users never logged in. They simply read the reviews, but never contributed. To resolve this, the site created a content gate and hides 'more of the review', as shown in Figure 4.9. To access the material, the visitor must share their details, which enables TripAdvisor® to gather more user data and better tailor its ads – as well as keeping its advertisers happy with a larger database.

Helpful? 2 Thank Nick D Report See all New York City hotels

Want to see more of this review?

Enjoy full access to millions of traveller opinions with just your email address

Enter your email address [Unlock this review](#)

or

[Facebook](#) [Google](#)

Yes, please inform me about travel deals, tips and new features on TripAdvisor. I can opt out at any time. [Already a member?](#)

We're committed to protecting your privacy and will not rent or sell your e-mail address. By proceeding, you agree to our [Privacy Policy](#) and [Terms of Use](#).

Figure 4.9 The TripAdvisor® content gate

Case Questions

- What is your view on paywalls?
- If you think they are acceptable, how much of the content should be shared?
- If you think they should be removed, how can the organisation pay the staff salaries?

4.8 BEST PRINCIPLES FOR CONTENT MARKETING

Developing a content marketing strategy requires an understanding of the fundamental purpose as to why the content is being created. Joe Pulizzi, founder of the Content Marketing Institute, and publisher Newt Barrett (Pulizzi and Barrett, 2009) recommended creating a content marketing roadmap that is underpinned by the 'BEST' principles, which is a useful framework to apply when developing content.

- **Behavioural** – Does everything you communicate with customers have a purpose? What do you want them to do as a result of interacting with content?
- **Essential** – Deliver information that your best prospects need if they are to succeed at work or in life.
- **Strategic** – Your content marketing efforts must be an integral part of your overall business strategy.

- **Targeted** – You must target your content precisely so that it is truly relevant to your buyers. Different forms of content will need to be delivered through different social platforms.

Let's work through an example using the fashion retailer Superdry, who created a blog article 'The jacket that photographs so well – Q&A with Constance Victoria' (Superdry, 2017c). Constance Victoria is one of their photographers and the story is a photo montage wrapped around the story.

Behavioural – The purpose of the article is to showcase how the jacket photographs so well and demonstrate a range of looks on three different-looking models. The natural result would be that as a possible buyer, you would imagine it would suit just about anyone. It becomes an easy purchase decision.

Essential – This is useful fashion advice, showing different looks and explaining that this is a great layer, regardless of the weather!

Strategic – This is a clever way of showcasing the product and also showcasing the photographer as a trendsetter who doesn't work 9am to 5pm. It differentiates the brand by allowing the photographer to explain this look and what they love about their job, reinforcing the brand's identity as an 'exciting contemporary brand which focuses on high-quality products' (Superdry, 2017a, p. 1).

Targeted – The blog content is longer and contains long-tail keywords such as 'denim Sherpa Girlfriend jacket' yet the Instagram post shown in Figure 4.10 is a single image with a short sentence: '**superdry** A denim jacket. The everyday style symbol' (Superdry, 2017b). The company has successfully targeted its content through different social platforms.



Q: Superdry talk now – can you explain the narrative of the collaboration and how you wanted to present the brand through your work?

A: With this collaboration I wanted to take the denim jacket in question and show how we could apply for any girl and any style. I decided to shoot it on various models each with their own distinctive style and aesthetic and give them the freedom to dress it up as they wish. We shot the images on analogue 35mm film to give it that raw and unedited feel and keep it dressed down and natural. We stuck to the streets of South London to give it the grungy every day vibe as well as an autumnal streak for this coming season.

Figure 4.10 Example of targeted content by Superdry

Source: <https://www.superdry.com/blog/the-jacket-constance-victoria/>

Activity 4.2 Evaluation of the 'Best' Principles for Content Marketing

1. Using the BEST framework, apply the BEST principles to a brand of your choice.
2. Evaluate their content; does it meet the BEST requirements?
3. If not, where are the gaps and why do you think this is?

See Template online: [Evaluation of the BEST principles for content marketing](#)

4.9 CREATING SUCCESSFUL CONTENT

Once your organisation has decided why the content is needed, it is time for some inspiration to start creating content.

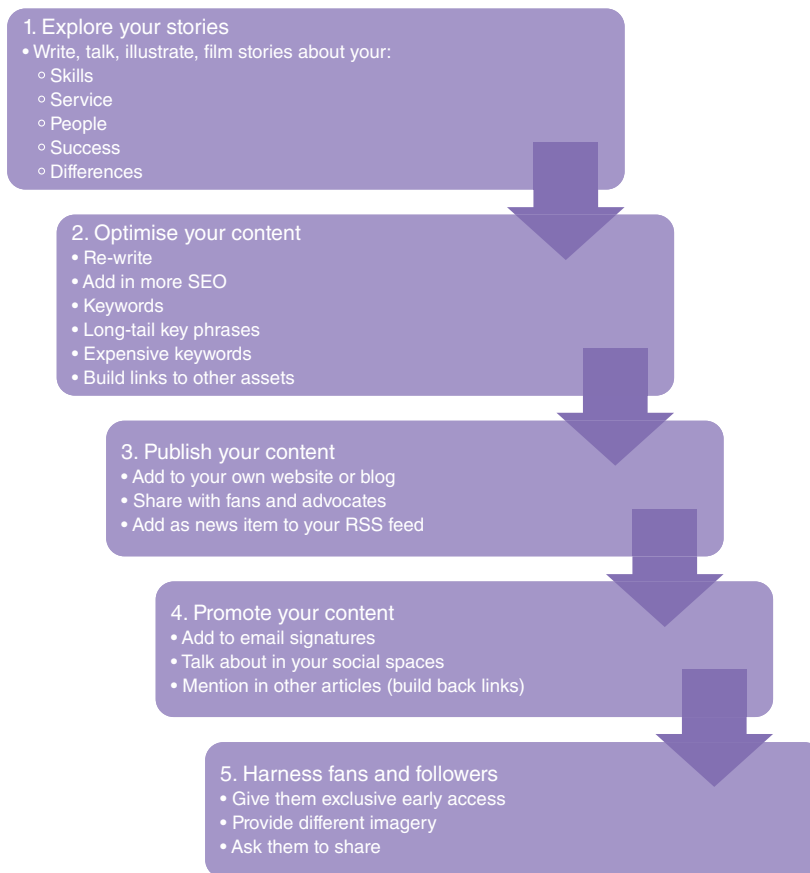


Figure 4.11 Content themes and content promotion framework

The easiest way to create content is to look inside the organisation and to write, talk or video others about the organisation's products or services. Why were they created? By whom and when?

Also consider the individual interests, passion and expertise of those inside the organisation. Most successful brands have been constructed on focused owners driven by a passion for technology (Steve Jobs), improving working methods (Bill Gates) or travel (Richard Branson). It is essential to be authentic and better not to sell, but advise, as shown in Figure 4.11.

4.9.1 COPE – CREATE ONCE, PUBLISH EVERYWHERE

One of the key issues to consider when creating content is known as COPE, which stands for 'Create Once, Publish Everywhere' (Jacobson, 2009). The aim is to create content that can be used in different forms. This is also known as breaking-apart content and is based on the premise that it takes time to create content, so it needs to work harder! It is possible to take one item of content, such as a survey, and divide it into eight separate pieces of content, as shown in Figure 4.12, the Content Maximiser™.



Figure 4.12 The Content Maximiser™

Successful content has been demonstrated to be more **vivid** and **interactive** (see Key Terms) (de Vries et al., 2012; Gensler et al., 2013; Pletikosa-Cvijikj and Michahelles, 2013). As a consequence, this means that the simpler and more basic the content, the less likely it is to be shared.

Facebook echoes this sentiment as it explains to advertisers ‘Your ad may not run. You may not reach your audience because there's too much text in the advert image. Facebook prefers advert images with little or no text.’

KEY TERMS VIVIDNESS AND INTERACTIVITY

The concepts of vividness and interactivity were originally discussed by Jonathan Steuer (1992). Vividness was concerned with the richness of online sensory characteristics and how far technology could stimulate multiple senses. Vividness could be conveyed via features such as contrasting colours, images and sound. Steuer classified interactivity as ‘the extent to which users can participate in modifying the form and content of a mediated environment in real time’ (p. 14) and according to the Content Marketing Institute, the top five types of interactive content used by marketers are: Assessments, Calculators, Contests, Quizzes, Interactive Infographics (Walters and Rose, 2016). Figure 4.13 shows examples of content on the vividness to interactivity scale.

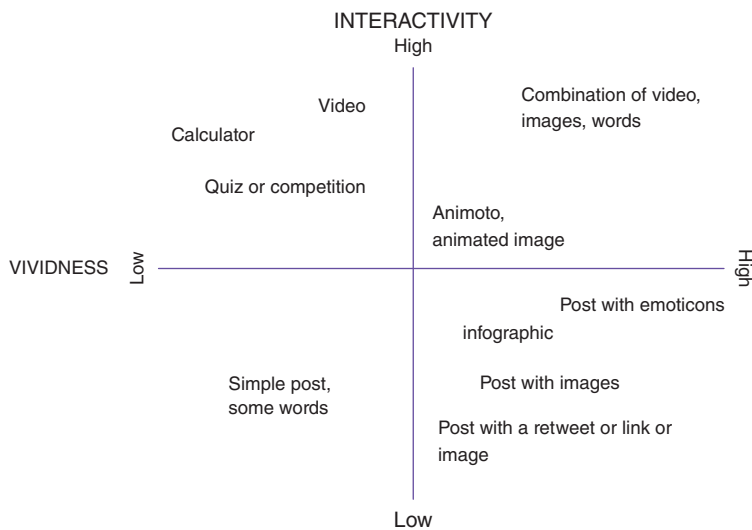


Figure 4.13 Examples on the vividness to interactivity scale

As an aide-memoire, I have created a scale of vividness to interactivity template, which shows the least vivid to most vivid and interactive types of content and is a useful tool for content creation.

Activity 4.3 Application of the Vividness to Interactivity Scale

1. Select a brand of your choice online.
2. Analyse the different content shared by the brand and judge where it fits into the vividness to interactivity scale.
3. What are your recommendations to improve or change the content?

See Template online: Application of the vividness to interactivity scale

FURTHER EXERCISES

1. For an organisation of your choice, create 10 pieces of short-form content.
2. Using Table 4.1 the Content Marketing Strategy Framework, create a content marketing strategy for an organisation of your choice.
3. For an organisation of your choice, write two pieces of long-form content (blog article, case study).

SUMMARY

This chapter has explored:

- Key elements of content marketing strategy from personas to content building blocks.
- The content management process from preparing a calendar to sharing guidelines.
- Different methods of content creation, based on the customer journey.
- Paid, owned, shared and earned media, with methods of conducting content audits.
- Best practices for content management and content marketing, with constructs of vividness and interactivity.

5

ONLINE COMMUNITIES

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

Understand the concept of self-presentation and self-disclosure theories

Apply recommendations for strategic online community management

Analyse the scale and scope of online communities

Evaluate rules of engagement required for your organisation

Create a plan to build a community that is engaging and thriving

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Identify and recommend relevant online influential communities for organisations to explore
- Plan, create and manage a successful online community for business

5.1 INTRODUCTION

This chapter will explain why there are benefits to being part of a community, as well as unravelling the diverse groups that exist. You will learn more about self-presentation theory and see why you should be careful about what you share online.

The role of the organisation in online communities is explored, along with how to respond to community feedback – including complaints, before they become a crisis.

5.2 WHY DO COMMUNITIES MATTER?

Communities were traditionally associated with a particular place and the people that lived there. We are long aware of farming communities, rural neighbourhoods and social groups, all promoting an idyll or pastoral myth of belonging, being part of a group that is often associated with connections that were created and nurtured over many generations.

Groups and societies provide a common bond or connection and many have existed for centuries, such as community-based groups, religious assemblies and professional guilds. These organisations are communities where people meet like-minded people. The concept of community and its impact has been a political topic for hundreds of years. A key piece of research, by Professor Mark Granovetter in 1973, published in the *American Journal of Sociology*, demonstrated how he explored connections within offline communities (see Key Term – **strength of weak ties**) and how they functioned. Granovetter argued that these interpersonal ties were founded on four key symbiotic and interconnected elements:

- The time in the group – how often you attend or participate or how much time you spend with those people
- The emotional intensity
- The familiarity, intimacy or mutual confiding – sharing secrets and personal stories
- The reciprocity – you help me, so I'll help you

A strong tie, where you know someone well, can help to find a job and equally a weak tie can help to pass on information. If you consider your LinkedIn network, some ties are strong – people you have known for some time; others may be weak – you met at a conference, they taught you for one semester, but the emotional intensity and confiding (familiarity) may not exist. However, Granovetter's work in sociology demonstrated that you may help someone in your wider LinkedIn group that you know less well, because of their links to your other connections.

Being connected to a community provides benefits and you may have heard the expression 'it's not what you know but who you know'. This describes how participation in a group can mutually help those in that collective. This concept has been formally recognised as access to 'social capital', through the wide array of connections and how one member helps another (see Key Term – **social capital**). Some groups were established specifically to enable members to increase and improve

their network, such as LinkedIn (LinkedIn Corporation, 2017, p. 1), which claimed the benefit of their community as ‘The mission of LinkedIn is simple: connect the world’s professionals to make them more productive and successful’.

KEY TERM STRENGTH OF WEAK TIES

Mark Granovetter explored the strength of interpersonal connections within communities, or as he called them, ‘ties’ (1973). He conducted research into ‘social networks’ and wrote about offline rather than online networks, as this was in 1973, before any online network was launched.

He investigated how people gained job opportunities and discovered that it was more often through indirect, rather than direct, contacts. People were more likely to help a contact they didn’t know that well (weak tie), more so than someone they knew well (strong tie). This has become a seminal paper in the area of social networks.

Some years later in the United States, Robert Putnam (2000) created widespread concern, suggesting communities were vanishing, with the fear that the internet would replace traditional communities. Putnam’s work influenced several American presidents, who were concerned about the possibility of communities dissolving, which could lead to an unstable society (see Key Term – **social capital**).

KEY TERM SOCIAL CAPITAL

The concept of community and its collapse was investigated by Robert Putnam in his book *Bowling Alone* (2000). In this book he developed the notion of social capital, which was originally proposed by Pierre Bourdieu (1986) as the value of the collection of interactions between two or more people. Capital as an idea represented the value or collection of assets and ‘social’ capital is the value of relationships within a network, which leads to social obligations or material benefits.

5.3 THE DEVELOPMENT OF ONLINE COMMUNITIES

In a digital environment, we have been forced to rethink the traditional concept of ‘community’. The internet has facilitated the rapid growth of online populations, from social media networks to interest groups; and from support forums to brand communities. Online communities can be public open spaces, such as a company Facebook or Twitter page. Or they can be closed communities or private groups in WhatsApp or Snapchat.

One of the first writers on **online communities** (see Key Term) was Howard Rheingold (1987, 1995), who studied the notion of virtual communities, as he moved from typewriter to computer. His studies focused on an early version of social networks, the WELL (Whole Earth 'Lectronic Link), an online bulletin board which started in 1985, where members could message one another. Table 5.1 shows a timeline of online communities, although today we would consider most social media platforms as forms of online communities. What is interesting is that most of the original online communities started as projects by students at university.

Table 5.1 Timeline of online communities

Year	Community	Purpose
1980	Usenet	Forum for online discussions based on specific threads, more of a bulletin board, exchanging messages. Started by graduates at Duke University in the United States
1985	The WELL	Online messaging service, also a bulletin board, started by writer and technologist
1991	Blacksburg Electronic Village	An entire village connected via the internet which started as a university experiment
1994	TheGlobe.com	Initially a university project connecting people online, closed in 2008
1995	classmates.com	A forum to connect former classmates and a type of social network. Still running but focused on the United States
2002	Freindster	Started as a social gaming site, allowing those in the forum to contact others and to share content. It is also considered as one of the first social media networks
2004	LinkedIn Groups	The social network created groups to facilitate conversations between people who were not connected
2005	Ning	Launched as a platform for groups to build their own online community
2006	Facebook Groups	Launched to allow like-minded people to create discussions or organise help forums
2010	Facebook community pages introduced	Community pages are a bit odd. There are already pages for communities in Group Pages and unofficial fan pages, so the development of community pages has been questioned by many!

Most social media networks host a forum or space for online groups to be created; this is to keep people within the social network ecosystem. However, hosting a community via a social media network creates several challenges for organisations:

- The organisation doesn't ultimately control who sees the content.
- As the terms and conditions change on a regular basis, the risk is that the organisation could create a large online community and discover that the social media network has decided to end its online community facility!
- Online communities can be created by fans or foes, and unless they are breaking the law (e.g. making incorrect comments – libel, or using your registered logo – breach of copyright) it's difficult to take any action to close a community that the brand or organisation doesn't favour!

KEY TERM ONLINE COMMUNITIES

Definitions of online communities include:

A virtual community is a group of people who may or may not meet one another face to face, and who exchange words and ideas through the mediation of computer bulletin boards and networks. (Rheingold, 1987, p. 178)

An online community can be defined as an aggregation of people who share a common interest and communicate through electronic mailing lists, chat rooms, Internet user groups or any other computer-mediated mechanism. (Kim et al., 2008, p. 410)

5.3.1. DIFFERENCES BETWEEN TRADITIONAL AND ONLINE COMMUNITIES

Dale Ganley and Cliff Lampe investigated social network principles in online communities (Ganley and Lampe, 2009). In their work they identified differences between traditional and online communities, which included:

- Less structure guiding the online community
- Less at stake for online participants as they can simply leave and may never be in contact with other community participants again
- Less transparency as many online communities enable the use of pseudonyms or facilitate anonymity
- An informal agreement rather than a formal hierarchy is in place within online communities

In some places these differences are obvious, for example in online communities it is possible to join and leave the community at will. Whilst Ganley and Lampe consider this as meaning there is 'less at stake' (p. 267), this also suggests there is less commitment.

If you are a member of a traditional offline community that meets every week, say an art group, someone might message you if you miss a meeting or two. If you miss a few meetings you may feel you are letting the group down, yet online you can vanish overnight and no one will notice.

The use of pseudonyms and forms of anonymity has been discussed within research into online communities. One level of anonymity is used to commit malicious acts such as cyberbullying, trolling, fraud and hate crime (see Key Term – **Cyberbullying and trolling**, p. 82). At another, anonymity is in place to protect the individual's personal data.

In situations where there is some data, such as a personal profile, or bio, the information is often limited and may not present a total picture. Researchers Chantal Bacev-Giles and Reeshma Haji considered perception in social media profiles and suggested that the lack of detail forces us to 'fill in the gaps' (Bacev-Giles and Haji,

2017, p. 50). Thinking back to the art group, you may not know all the details about all the members, but you know approximately where they live, whether they drive or walk, their artistic preferences and if they like tea or coffee. Perhaps this is why so many people declare an interest in tea or coffee on their Twitter profiles?

Looking at the first and last differences between online and traditional communities suggested by Ganley and Lampe (2009), they are similar: the lack of structure and the lack of hierarchy. On Twitter, no one seems to be in charge. All manner of comments and content is published regardless of the rules. The volume of content makes it more challenging to manage. Reflecting back to the art group, there is a structure and a hierarchy. There would be a start and finish time. Someone needs to book the room, arrive early to let the members inside, ensure the meeting finished on time and someone else may invite guest speakers and encourage new members to join.

Online groups can exist in a 24/7 environment, with many 'registered' members but few participating, so it doesn't matter if you join and never turn up again. No one will chase or castigate you for lack of attendance. On the other hand, in an online community you can share as much or as little about yourself as you want. This is part of **self-presentation** and **self-disclosure theory** (see more below), and one challenge is that sometimes you can unwittingly reveal a little too much detail.

Your online self

In 1956 Canadian sociologist Erving Goffman explored how people presented themselves to others, consciously and unconsciously. He suggested that there were many reasons for managing the impression given and we control the situation like actors to influence the behaviour of others as they may treat us better if they perceive a certain status.

Goffman proposed a theory of self which has become known as **self-presentation theory** (Goffman, 1956). Three years later the report evolved into a best-selling book (Goffman, 1959) and the theory continues to be used by researchers in online communities and social media today (see Discover More on Self-Presentation Theory).

Goffman discussed 'sign vehicles' (Goffman, 1956, p. 1), which we would call personal information cues or clues, which in our online communities we could consider as the profile photo, types of posts and likes.

Self-presentation theory suggests people have the desire to control the impressions that other people form about them. Sounds familiar? It's also known as 'impression management'.

DISCOVER MORE ON SELF-PRESENTATION THEORY

Researchers Liad Bareket-Bojmel, Simone Moran and Golan Shahar investigated self-presentation on Facebook and identified people using 'enhancement' strategies to better present their self in this environment. They named the enhancement strategies as:

- a. presentation of the self in a positive manner (behaviors, attributes, attitudes, and feelings);
- b. presentation of the self in a socially desirable manner;
- c. self-promotion designed to impress an audience with one's competence or talent. (Bareket-Bojmel et al., 2016, p. 791)

Read their article in the *Journal of Computers in Human Behavior* for more detail.

Online communities have been the subject of much research as they provide rich sources of ready-made data. One researcher, Rob Kozinets, has spent years investigating online communities, to the extent that he evolved the concept of ethnographic research (studying subjects in their natural habitat) into a method for researching online groups, which he named 'netnography' (Kozinets, 2002).

Online communities provide easy access to data and observing groups using netnographic methods provides researchers with sources of significant amounts of behavioural information. However, this type of online study is not without its critics. One of the ethical challenges, with researchers analysing and collecting content within online groups for investigation, was noticed by Godes and Mayzlin (2004), who remarked that 'consumers' decisions to participate in online communities is undoubtedly made without the consideration that firms may be observing these conversations and drawing inferences from them' (2004, p. 558).

5.4 WHY ONLINE COMMUNITIES EXIST

Having considered the concept of online communities, the next factor is their use. Why do online communities exist?

The earliest online communities, such as those listed in Table 5.1, were member-to-member support groups, sharing information, thoughts and opinions. Writing in the *Harvard Business Review* in 1996, two management consultants, Armstrong and Hagel, also identified the real value of online communities as the function of customers being able to speak with other customers.

The use of online communities could be divided into two primary purposes for both organisations and individuals:

- Hedonic: entertainment, communication, support
- Utilitarian: information, education, contact

It may be that I am a member of an online group on LinkedIn for utilitarian purposes, to gain information and network with like-minded people. Within Facebook, a group might be for fun; it might have a hedonic focus. (For more on hedonic consumption see Key Term – **hedonic and utilitarian consumption** in Chapter 2, The Digital Consumer).

The next section proposes a typology of online communities and highlights the different types of online communities that exist.

5.4.1 A TYPOLOGY OF ONLINE COMMUNITIES

There are many formats of online communities, as they can be open or closed, public or private, official or unofficial. Looking at individuals, they may join online communities that are based on special interest, mutual benefit or consumption. We will consider the benefits for organisations in the next section. Let's examine the different types of online communities in more detail.

Communities of practice

Communities of practice are those focused on common goals or with mutually held convictions. As a concept, 'communities of practice' was developed by Jean Lave (1991), who explored different styles of learning; for example, researchers can share their work on the website researchgate.net which describes itself as 'a leading platform where the world's scientists share their research and expertise, collaborate on projects, and engage with the best scientific content'.

These online communities are less structured than formal communities and provide educational benefits to their members.

Communities of interest

Moving from education to hobbies and interests, the social networking platform Pinterest is a good example of communities of interest, as individuals share images based on common themes. Communities of interest may be demographically different, living in different environments, and the thread that surrounds the community is a common interest.

Another example of a community of interest is The Student Room (thestudentroom.co.uk), which claims to be 'The UK's biggest student community'. Its most popular forums are: relationships, chat, video games, fashion, uni applications and uni student life. Its equivalent in the United States is known as College Confidential (talk.collegeconfidential.com). What is interesting is that although these two communities are separated by thousands of miles, the topics are similar, focusing on student life, achieving good grades and getting into the right place.

What is interesting is that this community of interest has developed a form of hierarchy with some forum members having contributed many posts, although earlier researchers Dale Ganley and Cliff Lampe (2009) suggested that a key difference between a traditional offline community and an online version was the lack of structure. It seems we may be transferring or perhaps blurring the typical traditional features into our new online environments.

Communities of transaction

Communities of transaction, which are also known as transaction communities, enable the 'buying and selling of products' (Armstrong and Hagel, 1996, p. 135). They are not about specific practice or interest; instead they allow individuals to be either a buyer, a seller or both.

In a pre-internet age, if your parents or grandparents were upgrading or changing their furniture, they may have sold the older furniture through an advert in the local paper. Communities of transaction have become the online answer to the local paper and whilst both services facilitate transactions between individuals, the differences with the online community include:

- A much wider market can be targeted, beyond the typical reach of a local paper.
- Interested people can monitor results and decide whether to sell a similar product.
- Individuals can bid via an auction system rather than paying a fixed price.

However, in this situation neither party is technically a retailer; they don't have an endless supply of sofas or dining room tables, it may be a stock of one item.

One of the largest communities of transaction is eBay, which describes itself as 'the world's online marketplace; a place for buyers and sellers to come together and buy or sell almost anything!'

There's less regulation in these member-to-member sales organisations. eBay and others have introduced feedback and star rating systems, along with a comprehensive help guide for what action to take when things go wrong, including a dedicated resolution centre which aims to settle issues:

We always encourage our members to communicate with each other when there's a problem with a transaction. The first step is to contact the member through the Resolution Centre and try to resolve the problem. (eBay Inc., 2017b)

In 2013 eBay launched its Money Back Guarantee which 'covers over 99% of listings on ebay.co.uk when you pay with PayPal' (eBay Inc., 2017a).

The challenge is that there is no higher authority where people can complain and there is no opportunity to return the goods after 30 days, which many retail stores permit.

Communities of relationship

Whilst there doesn't seem to be a great difference between the notion of communities of interest and communities of relationship, Armstrong and Hagel (1996) suggested that these were often constructed around life events to provide emotional/psychological support. They further suggested that these communities 'can lead to the formation of deep personal connections' and one unusual factor in a virtual community is that 'people often are aware of one another's actual identities' (p. 136).

Communities like The Student Room encourage usernames that are often pseudonyms, rather than the person's real name, to protect identities.

Communities of fantasy

Escapism online often occurs via online games where individual users are identified by an alter ego or avatar. To support game playing and improve practice there are hundreds of forums for players of games such as Call of Duty, Minecraft and others.

Ethical Insights Dating Deception

One community where strategic self-presentation and deception are prevalent is dating sites, as the goal is to gain as many romantic opportunities as possible.

Exaggeration, fabrication of characteristics and portrayal of a better 'ideal self' is commonplace in online dating and has been explored significantly by many researchers.

Interestingly, Rosanna Guadagno, Bradley Okdie and Sara Kruse (2012) discovered that greater numbers of men lie and change their characteristics in online dating sites than women ...

So be careful who you're connecting with online!

To protect their online identity participants create an alter ego using names such as BULLET_PROOF101, ShadowCatVA, CAMANDERWOLF and destroyer1702.

Consumption communities

Business support groups can be both consumption communities and brand communities. For example, Apple shares details of its online communities which are often based on the device owned and your location. They share similar goals even though their web appearance is totally different.

Brand communities

Brand communities can be brand-owned or fan-owned, and, according to Relling et al. (2016, p. 107), 'Brand communities offer effective means to achieve favorable brand outcomes, such as enhanced consumer brand loyalty.' There can be a brand community for almost anything, from cars to toys, from film star fan clubs to pop groups. The challenge is that not everyone behaves well inside brand communities and they can be used as a place to complain (see section 5.6.3 Responding to community feedback) and troll other members.

Social networks

Networking or partnership communities can be focused on the extension of a social circle, with little or no pre-determined context, such as Facebook. These are typically social network communities.

Online social network communities can be established based on demographic features, such as those shown in Table 5.2.

Table 5.2 Demographic features within online communities

Feature	Details
Gender	Groups established based on gender or sexual preference
Language/Culture	Communities created based on language, culture, or other forms of social identity
Location	Local or regional online networks

Feature	Details
Social status	Communities established due to educational or other connections, such as alumni groups
Vocation	Limited to certain job roles
Workplace	Organisations can establish dedicated work groups where they try to establish communities

One of the challenges with social networks as online communities is that we may post and share much more than we mean to. This has been investigated by researchers and is known as self-disclosure theory. This considers what we post online and why.

We are what we post

Hope Schau and Mary Gilly extended the theory of self-presentation (see above) to develop self-disclosure theory in their article 'We are what we post? Self-presentation in personal web space' (Schau and Gilly, 2003). Their analysis of personal websites aimed to understand why someone discloses their personal details online. Their findings indicated that the drive to self-disclose is to communicate with others and to display different selves online. They commented that 'consumers use multiple self-presentation strategies to construct digital collages that represent the self' (p. 390).

Apply this to your self-presentation and you may have one representation of yourself on a university hall's Facebook page, a different one on LinkedIn and your WhatsApp self may be totally different. You're building a patchwork or collage of your identity online which is generally OK, unless it all comes together and shares too much detail!

DISCOVER MORE ON SELF-DISCLOSURE THEORY

Hope Schau and Mary Gilly's (2003) article is a good starting point on self-disclosure theory: 'We are what we post? Self-presentation in personal web space', published in the *Journal of Consumer Research*.

See also Stephen Cory Robinson's (2017) article 'Self-disclosure and managing privacy: implications for interpersonal and online communication for consumers and marketers', which was published in the *Journal of Internet Commerce*.

Taking this one step further, Jihyun Kim and Hayeon Song identified two types of online self-disclosure – professional and personal – when they were exploring celebrities' self-disclosure (Kim and Song, 2016, p. 570).

Well-known individuals are stuck between sharing sufficient information so that their audience continues to follow them and balancing this with trying to maintain some privacy. As an example, singer songwriter Ed Sheeran quit Twitter, having joined in

October 2009 and gained millions of followers. His @edsheeran profile was changed to 'I don't use this anymore, please follow me on teddysphotos on Instagram, lots of love x'.

One of the challenges with self-disclosure is known as the 'privacy paradox' (Barth and de Jong, 2017), where users post and share significant amounts of information online but are either consciously or subconsciously concerned about their online privacy. The privacy paradox suggests that there is a gulf between actual behaviour and attitudes towards privacy, although researchers Philipp Masur and Michael Scharkow discovered that young people are concerned with their online privacy, contrary to popular opinion from their parents and others (Masur and Scharkow, 2016, p. 10). The challenge is managing the amount of disclosure. Susanne Barth and Menno D.T. de Jong from the University of Twente in the Netherlands have written a helpful review article, published in *Telematics and Informatics*, about the privacy paradox and looking at earlier research in this area: it is entitled 'The privacy paradox – Investigating discrepancies between expressed privacy concerns and actual online behavior' (Barth and de Jong, 2017).

Activity 5.1 Your Privacy Paradox

1. Assess your online profile to explore your online shared data, saying where the data exists (i.e. Facebook, Pinterest, Twitter etc.)
2. How much do you reveal?
3. Do you have to login to see the data or is it available publicly for anyone to see?
4. How do you feel about this?
5. Discuss with your classmates.

See Template online: Privacy paradox checklist

With the development of so many social media platforms and so much self-disclosure, a new business has emerged – social media cleaning tools. They look for negative content such as: inappropriate and questionable content, sexually explicit content and content containing alcoholic beverages. One example is Rep'nUp (www.repnp.com), which checks for potentially damaging content and is popular with recent graduates before they meet employers who might peek at their Facebook pages!

5.5 THE ROLE OF THE ORGANISATION IN ONLINE COMMUNITIES

5.5.1 BENEFITS FOR ORGANISATIONS

Having considered why communities matter to individuals and the diverse types of groups, we need to understand the role of organisations in online communities.

The first factor is that if there are advantages for organisations, they will create communities and the benefits of online communities for organisations have been established by many researchers. From different sources I've assembled the five benefits of online communities for organisations:

1. Product discussions

Ensuring your product or service is positively promoted is a key factor in brand awareness. The ability to gain product discussions within an online community where customers promote the product to others is valuable and more authentic than the company trying to emphasise key features. When examining brand mentions, Godes and Mayzlin (2004, p. 558) noted a salient ethical point: 'consumers' decisions to participate in online communities is undoubtedly made without the consideration that firms may be observing these conversations and drawing inferences from them'.

2. Tools to influence sales

Similar to having product discussions, researchers Mavis Adjei, Stephanie Noble and Charles Noble identified that as consumers could communicate with each other in brand communities, they were successful in promoting sales because these conversations could reduce uncertainty and encourage purchase (Adjei et al., 2009).

3. Interaction between customers and non-paying customers

Nguyen and his colleagues examined implications for price perceptions in online travel communities (2015) and discovered that these communities included customers as well as non-customers, acting as advisors. The benefits to the organisation are to convert non-customers, although that was not the focus of their research. The work showed that organisations can comment on discussions taking place and better understand issues around pricing.

4. Passive engagement is an effective marketing tool

Writing in the *Journal of Marketing Research*, Christian Homburg and his colleagues studied consumer sentiment and in particular the impact of whether the organisation should adopt an active or a passive role within the community (Homburg et al., 2015). Their findings showed that consumers can react badly where organisations step in to the conversation. There are some short-term gains, but over time, there are diminishing returns. So the advice is observe silently and contribute to specific areas such as product-related blogs, rather than automatically joining in with all discussions. It's worth noting that this research was focused on online forums, rather than specific social media spaces.

5. Positive brand exposure is achieved via followers

Whilst Homburg's research used forums as the group being investigated, Noor Farizah Ibrahim and her colleagues looked at how brands responded to questions specifically

on Twitter. This microblogging environment is different from a Facebook or other brand community. The results were different and showed the benefits of brands replying and trying to help customers when asked (Ibrahim et al., 2017). It may be that more research is needed looking at both forums and social media networks, to gain a real comparison – it's a very large project!

If you apply this to your own practice, there may be influential communities that you follow. These could be individual or groups of bloggers or YouTubers. They may positively or critically endorse a brand. Organisations need to understand where their influential groups are online and either monitor, participate in or support the content.

Activity 5.2 Identify Your Influential Communities

1. Find your influential communities. These are likely to be the communities that others talk about and you may even be a member!
2. Consider your first, second and third most influential communities.
3. Identify what they are called, where they are based and whether they are platform-specific, such as only on Instagram:
 - What's the topic or area of interest and is this an official or unofficial group?
 - Is it a public group open to anyone or do you apply for membership?
 - What else do you know about the community?
 - When you have completed the template, share results with your classmates.
 - If you are on placement, apply this to the organisation where you are working. What are their influential communities?

See Template online: Identify influential communities in your market sector

5.5.2 WHERE ARE ONLINE GROUPS FORMED?

Business-to-business social media platforms, such as LinkedIn, have been popular spaces for companies in particular to establish online groups. However, there are said to be over two million groups on LinkedIn alone, yet many are barely attended and are either dormant or dying.

Microblogging platforms such as Twitter work well as a customer service system, as long as there are sufficient trained staff to respond. Yet blogs are often perceived as the company space and trusted less, as are company-moderated websites. At the other extreme, personal social media platforms such as Facebook do not always welcome large brands moving into private space, as it can be intrusive (see Key Term – **the uninvited brand**).

The challenge is that as there are benefits, every organisation wants to start its own community. It's not easy and establishing an online community requires a clear purpose, as well as ongoing maintenance. This all demands dedicated resources and there may be alternative solutions, such as participating in pre-existing ready-made communities or doing something totally different!

KEY TERM THE UNINVITED BRAND

Another critical matter is whether the organisation should establish a community at all. Susan Fournier and Jill Avery (2011) conducted critical work into the concept of the uninvited brand, where a brand barges into your personal space when you are least expecting it. How would you feel about this? As Fournier and Avery said:

Brands rushed into social media, viewing social networks, video sharing, online communities, and microblogging sites as the panacea to diminishing returns for traditional brand building routes. But as more branding activity moves to the Web, marketers are confronted with the stark realization that social media was made for people, not for brands. (p. 193)

This raised the question of brands staying out of social media communities and whether brands should be interrupting conversations, or embedding themselves into communities, to provide advice and support where relevant.

Let's investigate the critical factors to consider before establishing an online community.

5.5.3 FACTORS TO CONSIDER BEFORE ESTABLISHING AN ONLINE COMMUNITY

Before establishing an online community, organisations need to answer essential questions such as:

- What is the aim or purpose of the online community?
- What are its specific objectives?
- Have any Key Performance Indicators (KPIs) for our online community been agreed?
- What will be the community name?
- Is the preferred name available in the relevant social media networks?
- Where will the community be based (i.e. in a specific location such as Facebook or LinkedIn)?
- What does the community cover, in terms of focus or subject?
- What is not included in the community?
- Who will join the community? Existing or potential customers or both?
- Why will they join this community?
- What will make the community members participate?
- What will make the community members continue to return after joining?
- Who will create the content for the community?
- What will be the benefits of the community?
- What are the competitors to this community?

If you are working on placement or recently graduated and your boss suggests that they would like you to develop and manage an online community, you need to answer these questions and the organisation needs to commit to a long-term strategy, as well as dedicating resources to the endeavour. It's worth involving others in Activity 5.3 to test whether or not the online community will be successful.

Activity 5.3 Planning an Online Community

Using the online template listing factors to consider before establishing an online community, look at each question and provide a response. If some questions don't have an answer this indicates either that there are knowledge gaps or that the community is unlikely to be successful.

If you are not on a placement, select a successful community of your choice and work through the questions to see how many can be answered.

Also identify a community that is less successful and provide a response. Reflect on where the gaps exist and why this may be the reason for the lack of success.

See Template online: Planning an online community

One of the arguments in favour of establishing an online group is that customers have established their own group, representing the organisation, or perhaps purporting to but disseminating myths and fabrications. At this stage it is often better for a brand to create an official space as well as supporting the unofficial groups.

Alternatives to creating your own organisation's group include the formal endorsement of a fan or customer group, providing supporting information and cultivating brand ambassadors to convey correct information and reinforcing brand messages.

Digital Tool Create a Facebook Fan or Brand Page

- Think about a favourite film star, singer, brand or other entity.
- Log in to Facebook (or possibly join!)
- Go to www.facebook.com/pages/create.
- Follow the steps online and create a Facebook fan page.
- What content do you need to make this a great page?
- What knowledge gaps has this shown about your chosen favourite?

And don't worry! You don't need to publish until you're ready – it's a great way to try building a fan page and better understand the content required.

5.6 MANAGING ONLINE COMMUNITIES

If you already have an online community or have decided to establish an online community, the next stage is to manage the community. Managing the community doesn't mean controlling it, but it does mean responding to queries, providing information and supporting any brand ambassadors who are answering questions on your behalf.

Managing an online community requires resources in terms of people, time, technology and finances. One query to be addressed from the start is whether to have real people and real names as the community managers, or whether to have pseudonyms or nicknames. Pseudonyms are common amongst social media users and also used by some firms, although this lacks authenticity and should be avoided where possible.

London Northwestern Railway uses Twitter as its online community for service updates and mentions the real names of staff, as the example in Figure 5.1 shows.

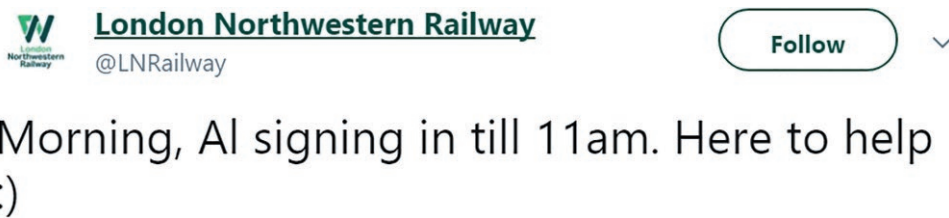


Figure 5.1 Example of London Northwestern Railway Trains' use of Twitter as a customer service channel

Source: <https://twitter.com/LNRailway>



Figure 5.2 Key factors in online community management

Online community management is a catch-all phrase that is about key factors, as shown in Figure 5.2. The challenge when working in these organisations is balancing all these factors at the same time.

Smartphone Sixty Seconds® – Online Community Manager Jobs

- On your mobile phone go online and search for 'online community manager jobs'.
- Select one job site.
- How many jobs did you find?
- How many of the above factors were included in these roles?

5.6.1 RULES OF ENGAGEMENT

When managing an online community, it is essential to establish the rules of engagement. This allows the community members to understand how the community works.

Rules of engagement may include those shown in Table 5.3, although your organisation may only need one or two of these rules, as many may not be relevant.

Table 5.3 Rules of engagement examples

Rule	Example
Legal or moral restrictions	Age limits may be required with topics around alcohol and gambling.
Definition of 'troll' activity and how you will manage it	We won't tolerate abusive or offensive behaviour.
Use of profanity or hate language	We'll block posts containing sexist or racist language. Although we don't want to censor any conversations within our YouTube community, as part of the overall YouTube policy any offensive posts to other users, or using expletives, will be deleted by our YouTube team.
Handling promotion of competitors or solicitation	If you'd like to sell products or services, please email details to (name).
Criminal activity	Be aware this is a public space and avoid fraudulent, libellous statements.
Inappropriate content	Inappropriate content such as pornography or violence will be blocked and users will be banned.
Spam, link baiting, or propagation of viruses or malware	Any spam or malicious content will be removed and reported to the relevant authorities.
Rules around being nice to staff	Please be nice as we're real people trying to help!
Managing expectations around response times	We're here from 8am until 8pm and aim to respond on the same day.
Contact details to redirect serious or private issues	Never share personal order numbers or address details. Message us and we'll respond.

Typically, organisations make the rules of engagement visible within the social media platform in obvious places, for example:

- Microblogging platforms: in the bio
- Social network and video platforms: on the profile photo or ‘about us’ or ‘description’ or ‘community rules’
- On blogs and websites: as an occasional post or in ‘guidelines’

5.6.2 BUILDING THE COMMUNITY

In addition to providing rules of engagement (see Table 5.3), when building a community some form of editorial tone of voice and editorial calendar (see Chapter 4, Content Marketing) will need to be developed, so that the organisation is speaking with the same voice and conveying the same messages, across all platforms.

This addresses whether the organisation provides guidelines about the frequency of content and types of responses that can be provided, for example:

- How frequently postings are created
- How frequently postings from the community are read and responses provided
- Whether individuals are named as community managers or if all posts are issued by ‘the organisation’
- If posts are moderated
- Whom to contact if help is needed (e.g. to report inappropriate content)

Community lifestages

Whether you are building or starting a community, it is useful to note that communities evolve through different lifestages, not dissimilar to the concept of a product life cycle. Douglas Atkin created a model of community lifestages, as shown in Figure 5.3. This model demonstrates the different work required by the community managers at the different stages. Let’s look at each of these stages.

Birth – community being launched

At this early stage it is critical to define the purpose, goals and membership profile of the community. With clear goals and membership criteria it is easier to grow. If there is no focus and the group is open to ‘everyone’, it is harder to encourage people to join.

In terms of recruitment, there should be a focus on recruiting doers and contributors who will promote the community. It is also important to make the community look attractive with a range of content, so there is a reason to come back to the community and explore what’s new.

Nurturing new members is essential to ensure that they feel welcome and you should encourage interaction between members. This connects back to Granovetter’s concept of tie strength (see section 5.2 Why do communities matter?) where you stimulate time spent in the group and familiarity between members.

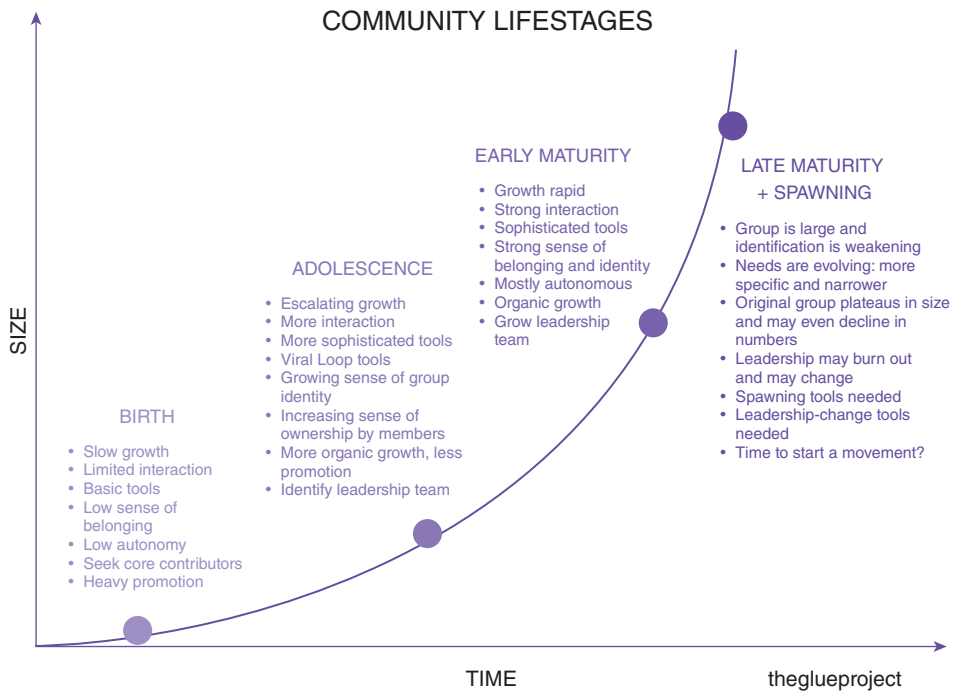


Figure 5.3 Community lifestages model

Source: www.thegluoproject.com/tag/lifestages

Adolescence – community established and starting to grow

Once the community has become established you may need to adopt more sophisticated interaction tools to monitor comments and respond (see Digital Tool: Disqus.com). Earlier in this chapter we looked at research from both Christian Homburg and his colleagues and Noor Farizah Ibrahim and her colleagues who all studied consumer sentiment and in particular the impact of whether the organisation should adopt an active or passive role within the community. The findings were mixed, as the results from both research groups suggested both options. Whether you adopt a passive approach and sit in the background or jump in and respond to comments depends upon the audience and the platform used.

As the community grows you may need to develop tools for members to recruit others. It can be easier for members to find new members – they are often similar people. And whilst, as we saw above, Dale Ganley and Cliff Lampe (2009) suggested that a difference between traditional and online communities was the lack of structure, for a community to thrive, you may need some structure and to identify a leadership team and roles to share the workload, as well as ensuring that some members are emotionally engaged and spend time in the group. The other consideration at adolescence stage is to organise member-management dashboards and metrics to better understand the results being gained from the group.

Early maturity – established community

Once the community is working well with the desired initial number of members, you will need more manager and community ambassadors to respond to queries and provide information. This may also be (and sit down whilst reading this) the time to bring the online group into an offline state! This could be by offering other meeting options which some groups achieve via ‘tweetups’ – real-life meetings of a Twitter group. This is best achieved by asking the members to see if they want to form sub-groups or local groups and of course if they want to meet up.

The content will need to continue to engage and bring members back to the community which means that more interactive content will be needed (see Chapter 4, Content Marketing).

Late maturity and spawning

Big groups are challenging and often lead to sub-groups and smaller groups splitting away. The overall group identity may be diluted and it is important to develop a succession plan and continue the long-term future of the group. The way to start the process is to review the community goals and decide what still works and what needs changing.

Digital Tool Disqus.com

Disqus is a web plugin tool that allows you to monitor comments from the community and respond. It can be added to a website or blog, where there is community engagement. It's popular as it blends into the look and feel of your site and allows real-time comments.

The program has a free option (with adverts) and paid-for options.

5.6.3 RESPONDING TO COMMUNITY FEEDBACK

Online communities provide a forum for community members and others, to share feedback about the organisation in public. This can include compliments as well as complaints and online community managers need to know how to respond, to both positive and negative comments, in the community.

Case Example 5.1 Argos and Customer Complaints

An example of directness, which moves swiftly into spite, is shown in Figure 5.4, where UK retailer Argos had many angry customers taking to Twitter and explaining that the traditional telephone route was not working.

(Continued)

(Continued)

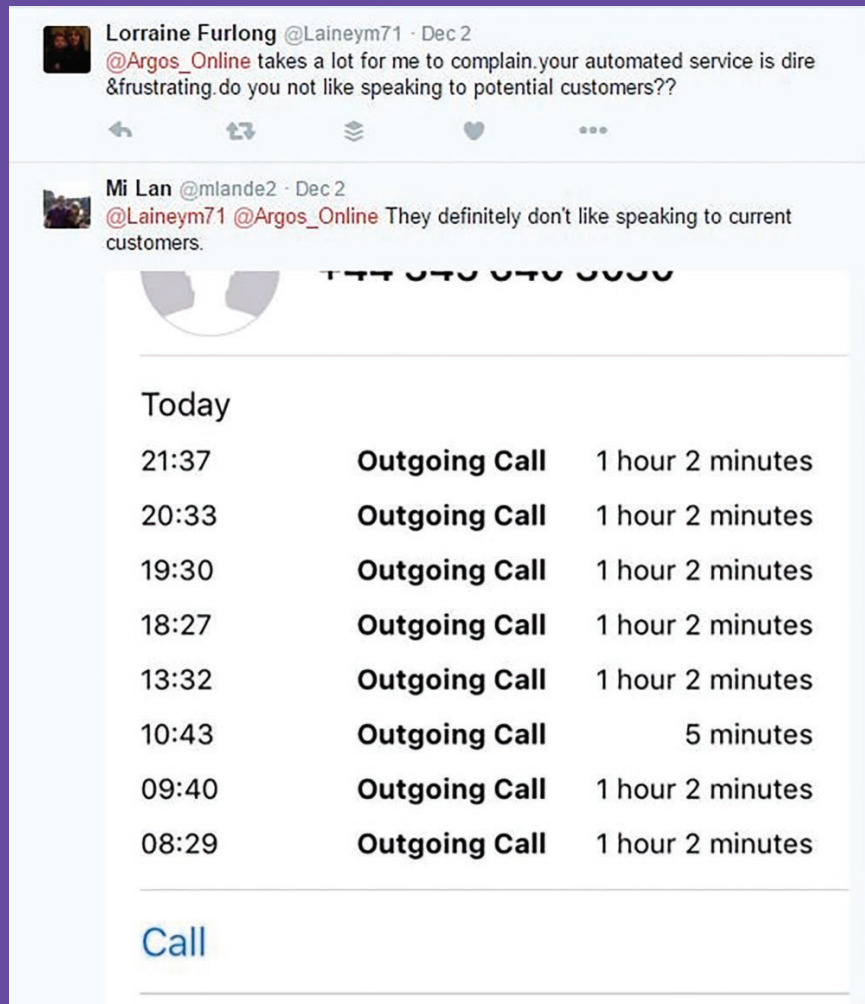


Figure 5.4 Example of customer complaining behaviour – directness

This case example demonstrates a lack of online and offline integration. The call centre team may not have been aware that there were complaints on Twitter. If they were, they could have issued messages to advise customers about the call wait times.

Case Questions

Imagine you are working for a well-known organisation, in their online community management team. You are managing a team and there has been an issue where things have gone wrong, for example:

- Transport company – a strike or cancellations
- Retailer – late deliveries
- Other company – calls to this number are taking an average of 30 minutes to answer.

Consider the organisation’s typical online tone of voice and based on this, what are your recommendations as to how the team should address unhappy customers?

- Prepare a list of all the possible complaints that may be raised.
- Create some stock phrases they could use to pacify or reassure the customers.
- Consider who else should be involved in the process to respond to customers in this situation.

By their nature, most communities are open for membership and viewing, which means that it may be the easiest place to complain. Gregoire et al. (2015) explored the role of social media in the customer complaining process. They started by considering the customer complaining process based on an initial service failure – that’s when something goes wrong – that occasionally then enters the realm of ‘double deviation’, where it goes wrong again. Figure 5.5 shows the types of behaviour based on these situations.

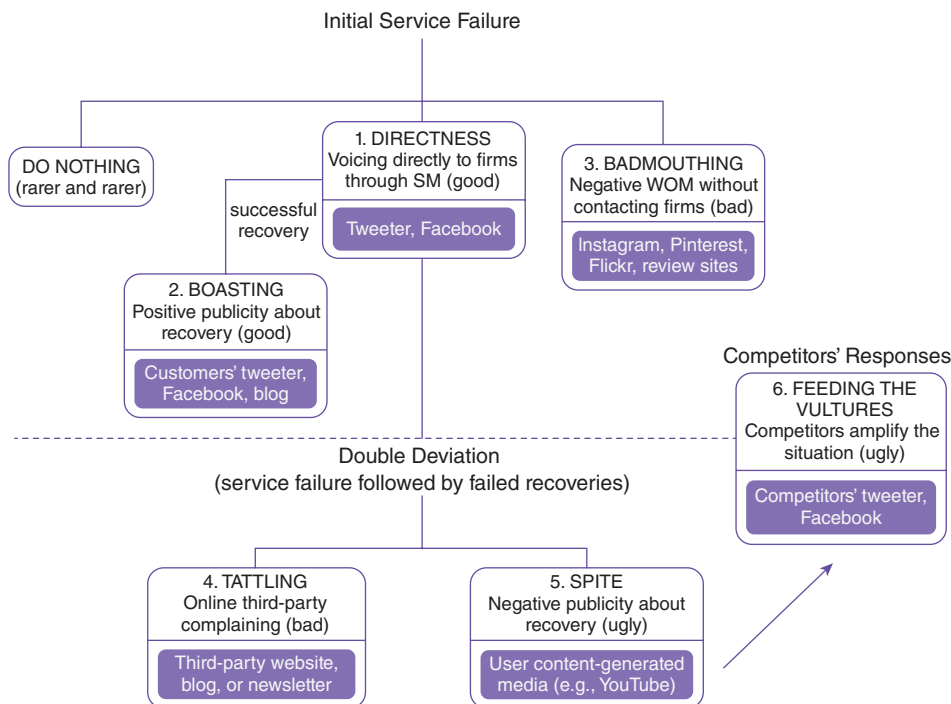


Figure 5.5 The place of social media in the customer complaining process

Source: Gregoire et al., 2015, p. 174

It is useful to understand why people complain, especially across social media, and the work by Gregoire, Salle and Tripp included a typology of social media complaints, which is summarised in Table 5.4.

Table 5.4 How to manage different types of online complaints

Type of complaint	Details	How to manage
Directness	Directly contacting the company online, through tweets or the company Facebook page, to constructively request resolution of a service failure	<ul style="list-style-type: none"> • Respond quickly! • Acknowledge within 1 hour • Basic issues: try to solve online • Complex issues: use a private channel
Boasting	Spreading good word and positive publicity via Facebook or Twitter about how well the firm resolved the complaint	<ul style="list-style-type: none"> • Thank the customer • Retweet and share – not too much
Badmouthing	After the first service failure, spreading negative word-of-mouth through one's Facebook network, tweets, blog, or YouTube account – all without ever contacting the firm	<ul style="list-style-type: none"> • Be proactive and acknowledge • Try to move to private channel • Publicly present the solution
Tattling	Complaining to a third-party website, blog, or newsletter	<ul style="list-style-type: none"> • Try to resolve • Expensive and late are better than viral and legal • Consider sharing circumstances, provide context
Spite	After the firm botches its response to the initial service failure and complaint, thus failing the customer twice, the customer spreads negative word-of-mouth with a heated vengeance via user content-generated media (e.g. YouTube).	<ul style="list-style-type: none"> • VIRAL WARNING! • Publicly acknowledge • Try to negotiate and compensate in person
Feeding the vultures	A competitor not only takes joy in the firm's mishandling of the complaint, but uses social media to amplify the mistake to steal more of the firm's customers	<ul style="list-style-type: none"> • Be gracious in defeat – not much else you can do

However, most companies tend to manage customers' negative feedback within the online community and ignore opportunities to respond to positive feedback. As a result, negative feedback is often generated online because the traditional methods for customers communicating to staff are not working. Either it takes too long to respond to phone calls, or the required response simply does not arrive.

Case Example 5.2 Marmite

Double Deviation

An example of double deviation by a firm is shown in Figure 5.6, when a campaign has backfired due to orders not being fulfilled, but worse still, those responding on social media are not correctly reading, or understanding, the messages.

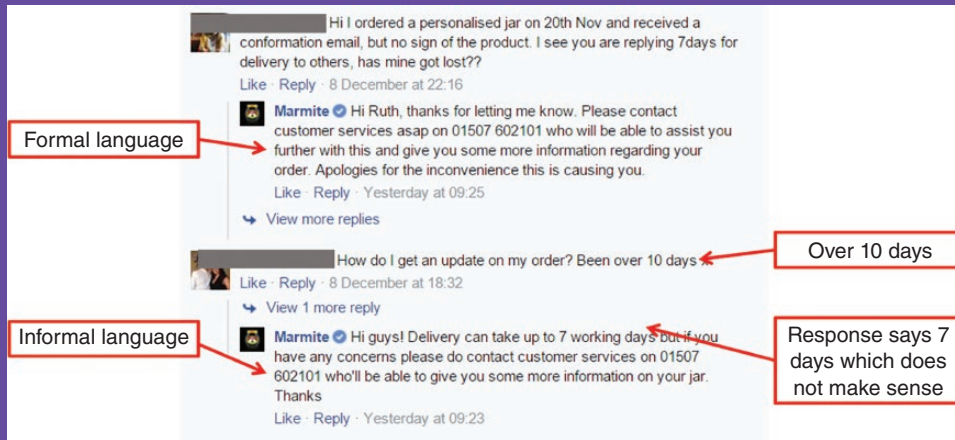


Figure 5.6 Example of double deviation by an organisation

One of the challenges in this example is that the response does not listen to the customer. The second customer is saying it has been over 10 days since the item was ordered and the online community manager at Marmite is saying delivery takes 7 days.

In the case example the tone of voice and language used is also inconsistent. The first response is very formal ('will be able to assist your further') and in the second this is less formal ('hi guys' and 'who'll be able to give you ...')

A critical factor is ensuring the team has been properly trained and briefed and all use the same tone of voice. The Marmite case example shows that the language on this Facebook page is less formal, more fun and quite chatty, but this is not reflected in their response to issues. Reasons for this may be:

- The situation was worse than the company realised, so they brought in a third-party company to manage the online responses as the regular team was unable to cope with the number of responses. The outsourced team has a different style and tone to those in-house.
- Lack of training. Newer members of staff are involved in the situation and have not been fully trained.
- Management are not committed to the community and have decided it is not worth investing in training.
- The responses are semi-automated (copy-and-paste block responses) so they fail to address the real issue.

Complaining online will grow and online community managers need to recognise the types of complaint and respond accordingly. When managing online communities, the rules of engagement need to be established with customers, to ensure that processes are clear.

DISCOVER MORE ON CRISIS COMMUNICATION

From time to time things go badly wrong and an issue becomes a crisis. For this you need expert help and can discover more with this textbook:

- *Effective Crisis Communication: Moving From Crisis to Opportunity*, 4th edition (2018), by Robert R. Ulmer, Timothy L. Sellnow and Matthew W. Seeger.

FURTHER EXERCISES

1. Find a brand that you admire and select one of its online communities. Identify whether there are complaints in these communities and evaluate good and weak practice of how these are managed. Make recommendations to improve the responses where relevant.
2. To what extent is it essential to establish an online community? Analyse the advantages and disadvantages of creating an online community for (a) a travel firm, (b) a clothing brand, (c) a music organisation.
3. For an organisation of your choice, create a plan to build a community that is engaging and thriving.

SUMMARY

This chapter has explored:

- The development and types of online communities.
- The role of online communities for organisations.
- Ways to manage online communities including rules of engagement.
- Best practice in building online communities.
- Responding to community feedback and online complaints.

6

MOBILE MARKETING

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

Understand the mobile ecosystem

Apply a promotional campaign for a new app

Analyse options for potential applications for iBeacons

Evaluate mobile adverts' adherence to a recognised code of conduct

Create a mobile app or an advert for an app based on key principles

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Check an organisation's website to see if it is mobile friendly
- Understand and describe the options for mobile advertising
- Use wireframe tools
- Understand the costs involved in app development
- Check and resolve location accuracy for organisations.

6.1 INTRODUCTION

Mobile marketing is an area of business growth, as devices are usually a few centimetres away from the consumer. Whether in a pocket, handbag or on the desk, mobiles are the one instrument we carry with us at all times.

Mobile devices bring additional challenges to the digital marketing landscape and this chapter explains the different functions and purposes of wearables, mobiles and apps and how these can be used for marketing.

6.2 THE MOBILE ECOSYSTEM

Since mobile phones were launched in the early 1980s, to the unveiling of the first-generation iPhone in 2007, mobile phone acquisition has increased every year. Over 90% of adults in the UK own or use a mobile and most of these are smartphones (Ofcom, 2017). In the United States, the number of mobile (or cell) phone subscriptions is greater than the population, indicating a trend to own a second phone, probably for work (World Bank, 2017).

We are now at a stage where people are concerned if they leave their mobile phone at home and mobile phone dependence has become the norm. Whilst there are recognised benefits of mobile phone usage, more addictive behaviours are developing where individuals need to pick up and check their phone many times a day (Tossell et al., 2015).

There is a good quote from Abdullah Sultan, who wrote in the *Social Science Journal* ‘today, it is not uncommon to observe couples or friends eating at restaurants where everyone at a table is using WhatsApp to text others rather than holding face-to-face conversations’ (Sultan, 2014, p. 58).

Two sources that contain data on cellular subscriptions and global information about mobile phones include the World Bank (<https://data.worldbank.org/indicator/IT.CEL.SETS>) and Statista.com.

Writing in the *Journal of Interactive Marketing*, two marketing professors, Venkatesh Shankar and Sridhar Balasubramanian, provided an early definition of mobile marketing as ‘the two-way or multi-way communication and promotion of an offer between a firm and its customers using a mobile medium, device, or technology’ (Shankar

Table 6.1 Mobile marketing implications

Feature	What this means	Benefits to marketers	Be aware of
Location specificity	Built-in GPS	Can target users in specific physical locations	Privacy issues
Portability	The constant companion	Makes it easier to communicate quickly	Small screen size means smaller messages
Untethered/wireless	No wires and easier to use anywhere	More opportunities to convey marketing messages	As used for short bursts of time, concise messages are needed.

Source: Adapted from Shankar and Balasubramanian, 2009, p. 119

and Balasubramanian, 2009, p. 118). They explored mobile phone adoption in their research using the Technology Acceptance Model (which we explored in Chapter 2, The Digital Consumer) as perceived usefulness and usability were key factors with mobile devices.

They summarised the key features and implications of mobile marketing, which I have adapted in Table 6.1.

6.2.1 IMPACT ON BUSINESS

Mobile commerce

Mobile commerce, which is also known as m-commerce, revolves around:

- Online sales (whether through ads to the main or mobile website)
- In-app purchases (part of mobile advertising)

From a business perspective mobile marketing can be used for business to: build lists; send promotional messages; deliver appointment reminders; chat now; share order and delivery details; send invitations; vote; provide coupons; generate orders; and collect payments.

Google (thinkwithgoogle.com) and Bing (advertise.bingads.microsoft.com/en-us/insights/your-roadmap-to-mobile-advertising) have created content about mobile marketing, sharing insights and key facts. The critical factor is that the mobile phone has truly created **ubiquitous computing** (see Key Term, p. 4) and we are always connected.

Mobile websites

We don't speak about mobile websites as much as we used to, as most websites are now constructed for mobile. There was a time when if you looked at a website on mobile you had to keep zooming in to see the words. Today most websites are designed for mobile, especially after Google said it would register the mobile friendliness of a website in its search formula. Websites are classed as mobile friendly when they are:

- Responsive – a single website is constructed which responds to the size of the device being used
- Adaptive – different websites are constructed for desktop and mobile sites

Responsive websites are a better option as only one set of updates is required. The main reason that adaptive websites exist is for legacy websites with significant amounts of content where it is too expensive or not feasible to deconstruct and start again. Google has created a website where you can check to see if your website is mobile friendly. See <https://search.google.com/test/mobile-friendly> and enter in the website URL, click 'test' and watch the results instantly.

The business impact of mobile has been recognised with the formation of a dedicated industry body association, the Mobile Marketing Association, which has organised a

formal code of conduct for mobile marketers which focuses on five categories (Mobile Marketing Association, 2008):

1. Notice – Mobile marketers must provide easy ways to identify terms and conditions.
2. Choice and consent – Users must opt in and should be easily able to withdraw consent.
3. Customisation and constraint – User information should tailor communications and mobile marketers should limit messages where requested.
4. Security – Mobile marketers should protect users' data.
5. Enforcement and accountability – Members are expected to abide by the code.

Activity 6.1 Evaluation of the Mobile Marketing Association's Code of Conduct for Mobile Marketers

The Mobile Marketing Association has created a code of conduct (visit www.mmaglobal.com) with five categories.

1. Using this code of conduct critically examine a recent mobile advert that you've received.
2. Consider each of the elements with the Mobile Marketing Association's code of conduct for mobile marketers and examine how closely these conditions were, or were not, followed.

See Template online: Evaluation of the Mobile Marketing Association's Code of Conduct for Mobile Marketers

The Mobile Marketing Association's report, 'The State of Mobile Marketing in EMEA', highlighted drivers in the mobile landscape with two key trends: (a) increased disruption to all markets and (b) the growth of mobile payments (Mobile Marketing Association, 2017).

Increased disruption

As mobile becomes mainstream with nearly all consumers owning mobiles, mobile marketing is disrupting traditional marketing efforts because it:

- Delivers ubiquitous computing, sharing direct access to technology at any time and place.
- Provides instant access to software, whether that's an app, voice search or online space.

- Permits the ability to check prices, compare online and offline, on the spot.
- Enables easier processes to order food, book transport, secure accommodation and buy tickets in real time.
- Incorporates a digital wallet, a means of paying by phone.
- Shares online reviews, which means you could read and subsequently change reservations, based on feedback from strangers!

This all means you could be about to purchase an item, book a meal, reserve tickets and find other relevant information online and change your mind. The traditional buying process is disrupted and those offering services need to change the way they work, to adapt to this new environment.

The challenge for business is readiness to adopt the technology (for more on this see Figure 7.2 Technology Readiness Scale, p. 186). Agencies feel that clients are not ready for mobile and, at the same time, clients have not identified collaboration partners. The issue may be that mobile marketing strategies are not yet in place.

6.2.2 BENEFITS FOR USERS

The mobile ecosystem delivers key benefits for users. A mobile phone provides: communications, media capture, media player, apps and games, personal database, concierge services, location services, barcode scanner, and it's a wallet as well. Let's explore all these benefits.

Communication

Mobile phones were originally designed for voice communications and mobile devices have now become the key method of social contact, whether it's via short text messages and instant messaging apps including Facebook, Snapchat and WhatsApp, or by making voice and video calls. We have adapted our communication styles and have introduced a new form of language called **textese** (see Key Term).

KEY TERM **TEXTESE**

Described by Alfonso Sánchez-Moya and Olga Cruz-Moya in an article about WhatsApp:

Textese as a language variety in Whatsapp shares most of its linguistic and discourse features with electronically mediated language. (Sánchez-Moya and Cruz-Moya, 2015, p. 301)

Media capture

Initially some mobile phones provided a camera function and this evolved from basic media capture into video, adding effects to images and enabling self-portraits,

known as ‘selfies’, which was the Oxford English Dictionary word of the year for 2013 (Oxford Dictionary, 2013).

Media playing

Media playing and sharing options, whether listening to music, podcasts, watching videos or films, is another aspect of mobile devices, as are apps and games. There are said to be over two million apps available (Statista, 2017b) and the key for developers is adding greater usefulness or functionality to ensure users continue to open and use the apps!

Personal database

Your mobile holds your personal database – the lists of your contacts, their phone numbers and email addresses. This is one of the most valuable assets within a mobile phone. Plus, the ease of transferring the data from one device to another has become simpler over time.

Concierge services

There is also another aspect of mobiles we could call ‘concierge services’, which comprises appointment or birthday reminders, through to storing hotel reservations and mobile ticketing for trains, airlines and buses. These are part of a smartphone’s typical offer.

Location services

Location services facilitate the discovery of what’s near me now, from coffee shops to the next train home, which has added greater utility to mobile devices. There is also the possibility to share location details with family and friends, which is facilitated through GPS technology.

However, there are also challenges! You may not wish to share your location with people you don’t know. Government agencies can and have tracked individuals. Whereas this seems reasonable when following felons and criminals, this data can be used to harm individuals where their otherwise normal behaviour contravenes local laws.

George Argyros and his colleagues explored the ‘privacy guarantees’ of Facebook and nine other online networks, including dating platforms Grindr, MeetMe and Tinder. They looked at real-time people tracking and identified vulnerabilities within different services which meant that you could be tracked by third parties when this was not warranted or wanted (see Argyros et al., 2017).

Barcode scanners

Bar code scanners and QR code readers can enable easy access to information where you can compare prices of goods, see more details about an item or perform specific actions (see the Case example of Gatwick Airport in Chapter 7, p. 197).

QR codes have evolved into augmented reality tools and, as an example, universities often have access to Blippar and Aurasma to turn flat 2D posters into 3D information videos (see Chapter 7 for more).

Ethical Insights Maps for Stalkers

Most of us have enabled our location services, the GPS on our mobile. We might use 'Find My Friends' to see if they are near us now, or perhaps you might find your friends on the Snap Map or via WhatsApp.

And if you are using dating apps, there is a good chance you are looking for people 'near me now' and so are they.

But what if you are being stalked? According to Brett Eterovic-Soric and his colleagues, stalkers are most often someone you know (Eterovic-Soric et al., 2017).

Although you can cloak your location via 'ghost mode' so your location is not visible, this is not guaranteed. As an example, whenever you post a story to Snapchat, it shares the location of the person posting the story. Plus, if your friends are tagging you and sharing their location, privacy leakage occurs, so you are never invisible online.

Mobile wallet

The ability to create a mobile wallet or mobile payment system, whether you have added a credit card or pay as you go, has meant the only device needed when you leave home is your mobile. Mobile payment types and examples of the different payment applications include:

- Mobile wallet which re-charges a credit card, such as Google Wallet, Apple Pay, Samsung Pay
- Mobile peer-to-peer payment system with services like Venmo, Facebook Messenger, Paym
- Pre-loaded credit cards into an app, typically used for convenience apps such as parking apps (PayByPhone, DashPark, RingGo) and shopping apps (Amazon)
- Text to pay, which are often used for fund-raising where the user is invited to 'text £5 to XXXX'.

As mobile payments have evolved, an ecosystem surrounding mobile payments has developed. Figure 6.1 shows an example of the m-payment structure and with so many partners involved in orchestrating a mobile payment system, it is not surprising that it is the bigger companies such as Google and Apple that can develop these systems. Samsung Pay was originally created by the team at LoopPay which Samsung acquired in 2015, saving themselves the time to develop the technology!

DISCOVER MORE ON MOBILE PAYMENTS

Read 'Study of mobile payment business model based on third-party mobile payment service provider' by Guoling Lao and Hanbing Liu, which was presented at an international conference on Management and Service Science, as this provides useful background information (Lao and Liu, 2011).

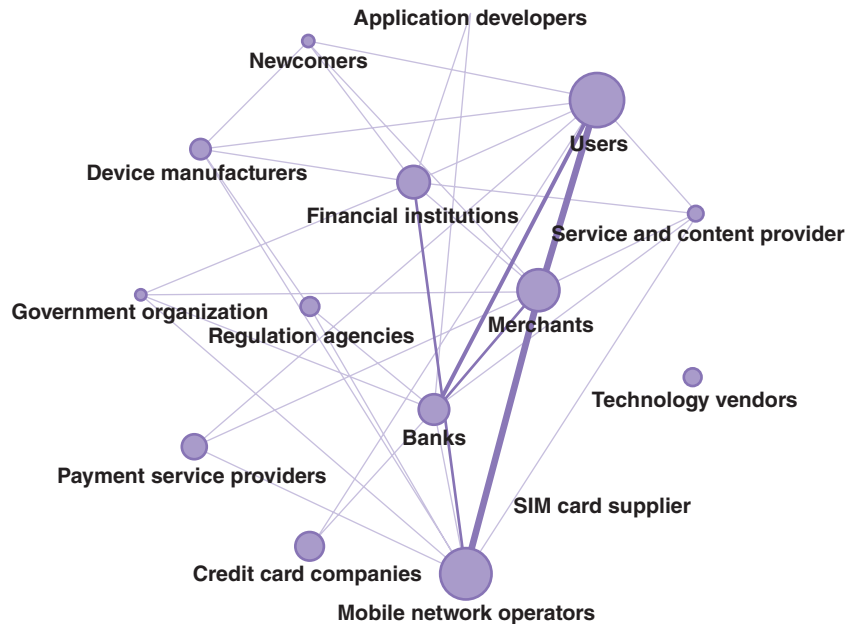


Figure 6.1 The structure of an m-payment ecosystem

Source: Guo and Bouwman, 2016, p. 63

6.2.3 TYPES OF MOBILE DEVICES

Having started with mobile phones, mobile devices now also include:

- Phablets – a bigger mobile phone that’s a mini tablet
- Wearables – smartwatches, activity trackers and video glasses
- Implantables – devices implanted into the body

Phablets

Researchers Chi Yo Huang and Yu Sheng Kao described a phablet as ‘an integrated smart device combining the functionality and characteristics of both tablet PCs and smart phone’ (Huang and Kao, 2015, p. 2). They also commented that the Samsung Galaxy Note was the first commercialised phablet.

Wearables

Abbey Lunney and her colleagues suggested that there are three categories of wearables (Lunney et al., 2016, p. 114):

- Notifiers – that give information about the world around you, such as smart watches

- Glasses – which use eyeglasses to create augmented virtual reality
- Trackers – which use sensors to record data

Considering these three categories, the challenge is that the lines are blurred. Smart watches can be notifiers as well as trackers. You can look at your smartwatch to see the outside temperature, the latest news, the location of your next meeting, and equally, these devices can be trackers, as they can record your activity and exercise achievements. The first smart watches were clunky and straight from *Star Trek*, designed to be noticed. We are now seeing smaller, more discrete and better designed items which are becoming pieces of jewellery.

Whereas most people think that electronic recording glasses started with Google Glass, researcher Richard Chalfen placed this into the arena of digital camera technology and commented that there was a long history of miniature spy cameras hidden in cigarette lighters, pens and attached to clothing (Chalfen, 2014). Google Glass was launched in 2012 and, although no longer available, the devices remain popular in the healthcare sector and are being used in telemedicine.

An earlier version of recording spectacles was GoPro, a wearable camera, launched 10 years before Google Glass. The difference between the devices was the additional functionality connected to augmented reality provided by Glass.

Wearable eyeglasses are no longer limited to augmented reality, they also act as mobile video recorders, with Snapchat Spectacles providing this functionality, albeit limited to downloading inside Snapchat. Richard Chalfen suggested that these cameras have three objectives (2014, p. 299):

1. To record ‘exciting’ even *unexpected scenes of action* and locations seldom, if ever, seen, to offer new, fresh, original and memorable perspectives;
2. To record *what the camera user sees* while undertaking a particularly unusual, difficult and dangerous activity; and
3. To record *what the camera user actually looks like* or how the camera user appears while actually participating in such a particularly unusual, difficult and dangerous activity; in short, often ‘extreme’ sports.

The issue with wearables is understanding how they can, if at all and whether they should, be used in mobile marketing.

Implantables

Implantables are more complex and would need permission from various health regulation bodies, although some are in development at the moment, for example:

- We already chip dogs as part of a pet passport system, so why not chip small children? Adding RFID tags could help locate missing children.
- Academics at the University of Illinois are working on epidermal microfluidic technology – smart tattoos that could open your car, gain access to conferences – could this mark the end of the festival wristband?

KEY TERM SMOMBIE

We are addicted to our devices and can't put them down, even when walking on busy pavements and crossing the road. This has resulted in people bumping into other people or lampposts, and a growing number of traffic accidents.

A description for these people was coined by the German dictionary *Langenscheidt* as Smombie, a concatenation of the words Smartphone and Zombie. It was made the 2015 youth word of the year (Langenscheidt, 2015).

Marketing application of devices

Having considered the different device types, how can brands harness these for marketing? Table 6.2 shows the use of wearables for marketing, with a range of examples.

Table 6.2 Use of wearables for marketing

Device	Sector/Company	Example	Issues
Wristbands (Nike fuel)	Insurance/ Esurance	Offers free wristbands in return for sharing health data	Free wristband but close monitoring of personal health data, exercise records
Wristbands	Leisure/Disney	The Magic Band – facilitates hotel room access, ability to unlock additional experiences	Can track all activity around the theme park and direct to less busy areas (might be less busy for a reason). Can upsell additional activities
Watch	Airlines/Various	Boarding passes on watch	Opportunities to add promotional messages near the gate. Can't board the plane if your battery runs out!
Watch	Insurance/Vitality	Offers free iWatch in return for sharing health data	Free watch but close monitoring of personal health data, exercise records. What happens when the exercise stops? Do the premiums increase?
Mobile app	Pharmaceuticals/ GlaxoSmithKline	MyAsthma tracks asthma state and advises about environmental conditions	Useful research data being created, but possibly too much data!
Mobile app	Skincare/Nivea	Solar bracelet free from magazines (tear out) and place on child's wrist and set maximum distance they can wander; an alert is sent to the app if they go outside the set zone	Parents may get complacent in thinking that the app is minding the children!

A mobile phone is never more than a few centimetres away. A watch or fitbit is attached from the moment you wake up, so this means that sending messages to your mobile can be intrusive. On a personal level, I don't share my mobile number as I am not

keen on sales messages appearing on my watch, so I find it an invasion of privacy when companies send sales or promotional text messages.

The question is how do marketers use these platforms in more innovative and effective ways? Vitality Health, in offering a free or low-cost Apple watch, have found one clever mechanism for promoting a business benefit to a device. This is a space we will see developing as companies explore innovative methods to connect with customers.

6.3 MOBILE ADVERTISING

Every new technology creates opportunities for marketers. One unmissed opportunity has been the development of the mobile advertising industry. We will investigate this but first we will look at advertising theory and how this features in mobile and digital advertising.

6.3.1 HIERARCHY OF EFFECTS

Advertising theory was largely founded on hierarchy of effects models such as AIDA, which stands for Awareness, Interest, Desire, Action (St Elmo Lewis, 1899, 1903) and the notion is that consumers move through a linear process. Bearing in mind that AIDA was created more than a century ago, it is just not how buying works today. If you look at consumer journeys (see Chapter 2, The Digital Consumer) you can see that they are now more complex. Yet equally, in a mobile world, they may be simpler as (a) we may need something; (b) search or check an app; and (c) buy – so we simply complete steps (3) desire and (4) action which removes half of the AIDA model and renders this model redundant in the digital environment.

There are more complex models, supported by significant data, that have evolved following decades of research. One model created in the 1980s was **the elaboration likelihood model of persuasion**, which is also a hierarchical model, as consumers move through a series of steps.

The elaboration likelihood model of persuasion

The elaboration likelihood model of persuasion (ELM) centres around the concept of attitudes that guide decisions when processing information and making decisions about communication messages (Petty and Cacioppo, 1986) and this is shown in Figure 6.2.

When creating this model, the researchers, Richard Petty and John Cacioppo, added *involvement* as a variable – we could call this engagement today – how engaged or disengaged is the consumer with the offer?

The model starts with *persuasion* and this initially considers context, at a personal level, and whether the offer has relevance and resonance for the consumer to be motivated enough to process the information. Persuasion is seen as a process where a favourable result, such as responding positively to an advert, is based on how the user interprets the message.

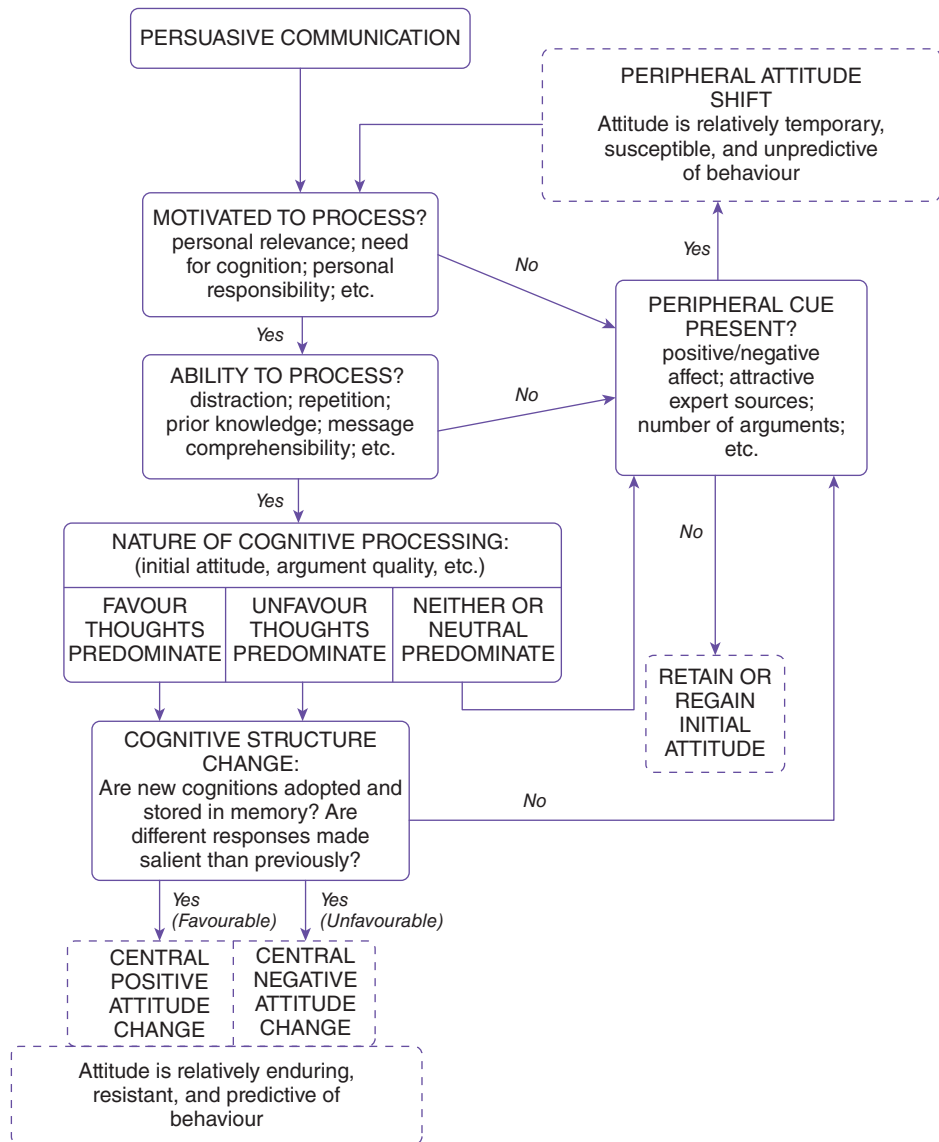


Figure 6.2 The elaboration likelihood model of persuasion

Source: Petty and Cacioppo, 1986, p. 126

This is followed by *situational context* and whether the consumer is able to process the information when received. Think about your own situational contexts, such as if you're on a train with weak Wi-Fi, ads on your mobile may be irritating and the ability to process may be reduced or removed. Both these factors influence how you process the information.

The ELM suggested that there are two different routes to processing the information and both are based on persuasion: (a) the central route; and (b) the peripheral route. The differences between the two routes are when consumers have:

1. High involvement (personal or contextual) to process communication, which involves greater cognitive processing effort, called *high elaboration likelihood*.
2. Where the motivation, ability or opportunity is low or consumers are unwilling or unable to apply effort to process communication, this is *low elaboration* and can be changed by peripheral persuasion cues.

As a hierarchy of effects model it has also been used as a construct in advertising research by many academics. At the same time, there have been criticisms of ELM as it takes a duality approach (either this way or that), it lacks rigour and is perceived as being too qualitative to be measured (Bitner and Obermiller, 1985).

However, it has been used by many researchers investigating online ads, and as mobile marketing centres around communication this model can help to inform advertisers as to the variables of what works. Figure 6.2 shows the stages of the elaboration likelihood model of persuasion.

6.3.2 MOBILE ADVERTISING

As there is a process for advertising to gain acceptance from consumers through persuasion, there are a range of mobile advertising options, as shown in Table 6.3.

Table 6.3 Mobile advertising options

Advertising format	Explanation	Advantages
Text messaging	SMS messages with offers	Easy to deliver
Mobile display ads	Banners on web pages and in apps	More effective for utilitarian purchases, recognised brands and higher involvement
Native mobile ads in-feed social	Looks like a regular piece of content although it must contain the word 'ad', 'promoted' or 'sponsored'	Behaves like an ordinary piece of content so easier to engage
Native mobile ads in-feed content	Within editorial feeds and on news walls	Matches site content
Native mobile ads in-feed commerce	Retail product listings on site such as Amazon, Etsy	Same functionality as other product listings and can prioritise specific product listings
Native mobile ads in-map	Ads that appear when you look at a map and see nearest coffee shop or takeaway restaurant	Users are less familiar with the location and may be actively seeking services such as food or drink
Native mobile ads in-game	Often used in games and free software, can work on a rewards or points basis	Captures users in the moment
Native mobile ads paid search	Typically these appear in search engines such as Google, Bing and Yahoo	Users often searching with intent and need the item at that time, so can result in higher conversion rates
Native mobile ads recommendation widgets	'Recommended for you' or 'You may like' widgets often appear at the end of some content	Can drive traffic to specific content
Native mobile ads custom	A more expensive option as these are often custom ads created by brands and can be editorial, apps, games or videos which work well with location data	Useful for brand awareness

Professor Dhruv Grewal and colleagues explored mobile advertising and created an effectiveness framework, which is shown in Figure 6.3 and which comprises seven components. These flag potential challenges and disadvantages of mobile advertising.

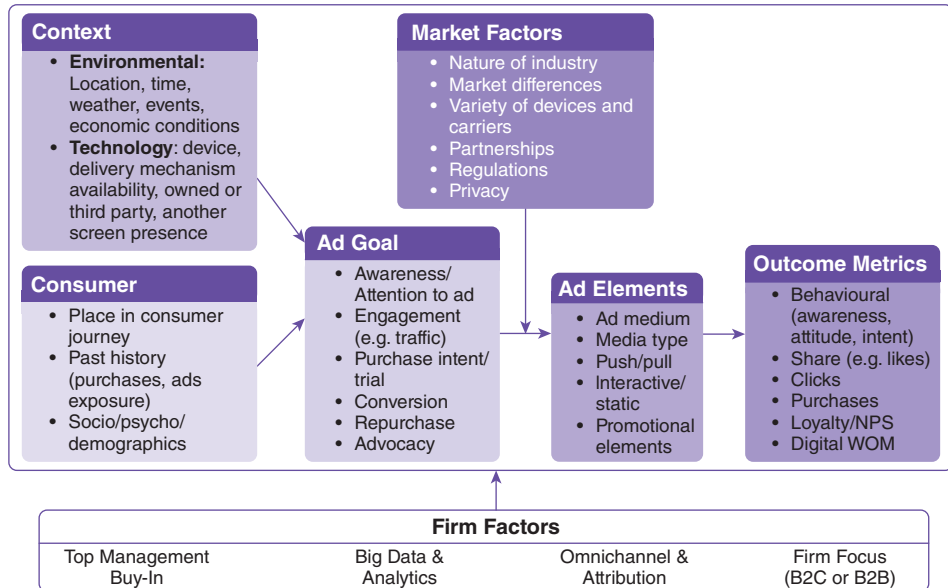


Figure 6.3 Mobile advertising effectiveness framework

Source: Grewal et al., 2016, p. 4

The first of these is *context*, which concerns the situation where the user receives the ad. Again, this is an echo from the ELM as situational context is a key factor, which could be based on the user's environment, which represents their physical location, or the technological context, which is about the device. Google has stated that there are more searches on mobile than on desktop and 30% of searches are connected to location (Google, 2016). So has Google become the new Yellow Pages? Each year we get a smaller and smaller telephone directory of local businesses. If there's a water leak in the bathroom, we need a plumber and thinking back to 40 years ago, we would have used Yellow Pages. Today, I might ask Siri for a list of plumbers 'near me now' or I might search for plumbers in my location. As Grewal et al. (2016, p. 5) observed, 'Google Maps offers a location-sensitive version of sponsored search advertising, such that relevant business ads appear as headlines in the displayed map'. If I need a service in an emergency, such as a plumber, I'm searching with intent. It's unlikely I am browsing the internet for the amusement of seeking plumbers! If I'm searching on a mobile with a small screen, I just need a set of relevant results.

Consumers or consumer context is the next area for consideration. This reflected on where a consumer might be in their journey (see Chapter 2, The Digital Consumer). Professor Grewal's research suggested that mobile ads might encourage recognition of an unmet need – the idea that you buy something you didn't know you needed!

Another area where mobile ads could help is to move consumers to competitors they may not be aware of, as well as reminding consumers about their purchase past history. Effectively at all stages of the customer journey, from pre-purchase, purchase to post-purchase, mobile ads could help.

Once the context has been understood, the next stage is the *ad goal*. What is the purpose of the advert? The difficulty is that the metrics are not standardised, which creates issues when measuring mobile. Added to this, the concept of attribution, which is about crediting conversions to touchpoints in the customer journey (see Chapter 13, Digital Marketing Metrics, Analytics and Reporting), can be complicated.

Market factors addresses six different issues depending on the location and target audience:

1. The type of industry is the first aspect to consider, based on the opportunities available in the local environment.
2. This is followed by the ability to deliver the ads through the channels, as different regions have different regulations as to what is and isn't permitted in that market.
3. The third factor is around the technology, as different devices facilitate different options.
4. The fourth aspect within market factors is regarding the relationships or partnerships, which encourages the marketer to explore how these could impact the ad choices.
5. The next item is regulations, and one factor that will impact mobile ads is GDPR (see Key Term – **General Data Protection Regulation (GDPR)**, p. 19).
6. The last factor is privacy, also connected to GDPR, and how this impacts on consumers and their perceptions of the brand.

Ad elements are about the channel (social media feed, in content, in maps – see Figure 6.3 for examples) and the media type – simple text ads, rich content and how it is delivered. This takes us back to message appeals that you have probably covered on an advertising module. If you haven't, take a look at Table 14.1 Message appeal types applied to digital marketing (p. 341).

Outcome metrics relate back to the ad goal and what the desired results should or could be. Grewal and the team suggested different types of metrics from awareness to word of mouth (WOM), and from clicks to the goal most organisations have – purchase.

The key is that mobile ads can target consumers based on:

- Handset type
- Connection – Wi-Fi or network
- Time of day
- Where you are (at home, at work, at the pub, watching football, shopping)
- Your behaviour (in the day, in the evening, first or second search for an item)
- Your demographics

Activity 6.2 Create a Mobile Advert

1. Select one target audience for the advert – this could be university students.
2. Choose two advertising formats.
3. Write the words for the ad, bearing in mind the space restrictions on a mobile phone.
4. Suggest suitable images, whether static (pictures, photos or emoticons) or moving (videos, moving GIFs).
5. Use other software (PowerPoint, Word, Photoshop) to build your advert concepts.
6. Present back to the class.

See Template online: Create a mobile advert

Platforms and tools

There are many mobile advertising networks available, of which AdMob by Google is possibly the best known as it offers app developers the ability to analyse, monetise and promote apps.

Figure 6.4, designed by computer scientists, shows a framework for how ad networks operate to manage publishers, applications and advertisers with advertisement libraries. This was based on research into combating fraud in mobile ad networks, so it was important to include all steps from the publisher to the advertiser. Fraud occurs in all forms of advertising and mobile is no exception.

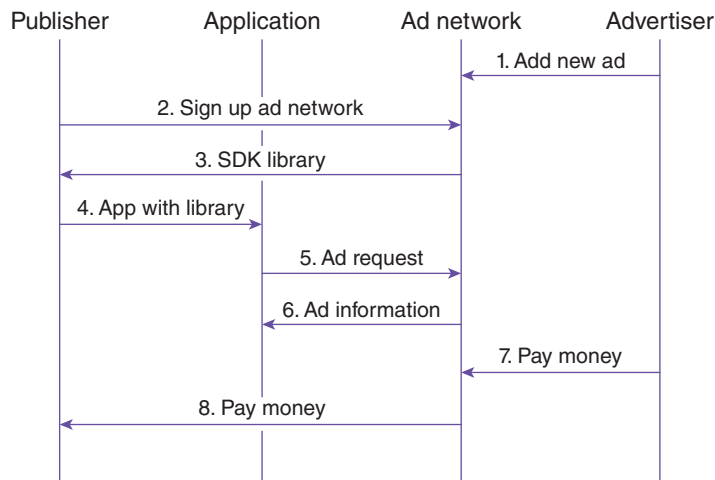


Figure 6.4 How ad networks work to manage publishers, applications and advertisers with an advertisement library

Source: Cho et al., 2016, p. 3

The acronym 'SDK' refers to the Software Development Kit, which is a set of tools for developing apps.

Figure 6.4 is a useful way to understand the process of implementing mobile ad campaigns as it's not as straightforward as an advertiser contacting a purchaser to promote a mobile ad. The mediator is the ad network, which could be Apple, Google or many others, depending on the ad objectives. There are specialist networks to monetise mobile games, as well as those that provide the results in search engines (see the following Smartphone Sixty Seconds® activity to explore the different mobile ad networks).

Smartphone Sixty Seconds® – Best Mobile AD Networks

- On your mobile phone go online and search for 'best mobile ad networks 2017'.
- How many networks do you find?
- Click on one of these to explore what it offers marketers.

The increase in mobile ads has led to a new illegal business called mobile ad fraud, which takes place through various technical means, including:

- Impression fraud – companies selling banners and stacking many banners on top of each other (ad stacking)
- Click fraud – generating a fake transaction and the publisher is charged; this is often created by **bots** (see Key Term) through automatic programs.

To combat this there are many bespoke software programs that can identify fraudulent behaviour, but this takes a significant amount of management and time.

KEY TERM CLICKBOTS AND BOTS

The best definition of clickbots (also shortened to bots) that I have found is from researchers Neil Daswani and Michael Stoppelman, who presented a working paper at a specialist computer conference which was the first to consider bots:

A clickbot is a software robot that clicks on ads (issues HTTP requests for advertiser web pages) to help an attacker conduct click fraud. Some clickbots can be purchased, while others are malware that spread as such and are part of larger botnets. Malware-type clickbots can receive instructions from a botmaster server as to what ads to click, and how often and when to click them. (Daswani and Stoppelman, 2007, p. 1)

Programmatic advertising

Karl Weaver, CEO of Isobar, a global, full-service, digital agency, often has to explain how online advertising, digital and mobile, has changed. He has contributed most of this section around programmatic advertising.

In the past advertising was booked via a phone call between a media owner and a media agency who struck a deal over placement and cost. Digital media enables this to be done automatically and, whilst estimates vary, it is recognised that programmatic dominates the digital display market, with budgets exceeding \$60 billion expected by 2018.

Programmatic advertising works as webpages typically carry spaces for advertising and when you load a webpage there is lots of information gathered about you and your web behaviour (see Key Term – **cookie**, p. 42). This data is sent back to an ad exchange where the inventory on the site is auctioned off to the highest bidder. The ad that wins appears on the page as you load it. The auction takes milliseconds and the process is referred to as programmatic real-time bidding (RTB).

Programmatic is a delivery method, and as shown in Table 6.4 there are unsurprisingly benefits of and downsides to programmatic advertising. This mainly centres around the speed of the process and the control afforded by the systems. Due to difficulties with how this works, Karl Weaver commented that ‘this has contributed to some clients deciding to take their programmatic buying in-house’.

Table 6.4 Benefits and downside of programmatic advertising

Benefits of programmatic advertising	Downsides to programmatic advertising
<ul style="list-style-type: none"> • Efficiency gains as the process is automated • No need to research where to place the ad as happens automatically • What to pay is automatically calculated and marketers have pricing control and can decide whether or not to enter the auction • Wider range of places to advertise • Access to digital performance data and analysis 	<ul style="list-style-type: none"> • Changes the nature of contracts between organisation and agency • The type and number of people needed to deliver the work are reduced • Data governance issues arise as less control as to where ads appear • Could remove the need for creative people • Ad fraud

To work out what ad space to buy, advertisers will use a **demand-side platform** (see Key Term), which means that there is limited human intervention. The process allows ads to be targeted to groups of people accessible across a wide range of websites.

KEY TERM DEMAND-SIDE PLATFORM

A demand-side platform (DSP) is automated software that bids on space available through ad exchanges, allowing the advertiser to manage the whole ad process in one place.

There are many DSPs and the larger ones include:

- Facebook Ads Manager
- AppNexus
- Rocket Fuel
- Amazon
- DoubleClick.

The future of advertising is programmatic, whether it's for mobile, digital, other channels like TV, out of home or traditional print media. Karl Weaver added:

Some believe that programmatic will 'terminate' the creative. This turns out not to be the case, at least for now. Creatives need to adapt, like they have done before – and they are. In fact, because the message can be personalised more easily with programmatic it usually means more creative content is needed to implement a successful campaign.

Case Example 6.1 Car Companies in Difficulty with Programmatic

Programmatic advertising can cause major problems and Jaguar Land Rover and Mercedes were alerted to their brand ads being shown in the same place as terrorist videos. Honda and Nissan car ads also appeared next to material relating to extremist political groups, without their knowledge.

This is a challenge with programmatic as no terrorist or extreme movement will use the labels and tags to correctly attribute the content of their work. This means that the only way that companies can ensure their brand videos are shown in the right places is to verify all locations, which is nearly impossible. There were different reactions to the findings and all companies were shocked and stated that they had not authorised the positioning. The challenge is that with 300 hours of video uploaded to popular sites like YouTube daily, this is difficult to monitor.

Jaguar Land Rover simply stopped its campaign and removed all its digital ads, whilst Mercedes asked its agency to review the situation and updated its blacklist (Dron, 2017).

Case Questions

Imagine you are working for a well-known brand and your ads appear next to undesirable videos, without your knowledge. You find out when a journalist makes contact to ask why your brand is supporting terrorists or extremists:

- What is your reaction?
- How could you explain this to the senior management team?
- How could you ensure it did not happen again?

6.4 THERE'S AN APP FOR THAT – MOBILE APPS FOR BUSINESS

Apps have risen in importance as we continue to download more and more apps. Each mobile phone we buy has more data storage, to cope with our love of apps. Apps can be expensive to develop and the cost depends on the purpose of the app and the functionality. The website <http://howmuchtomakeanapp.com> provides an indication, based on your requirements.

6.4.1 TYPES OF APPS

There are three main types of apps that will be discussed here.

Native app

Developed for use on a specific platform, such as iOS or Android, and to work offline. Native apps are totally compatible with the software and hardware of individual devices. They are often more expensive as you need to carry out separate coding projects for each device that needs to access the app. As an example, the PayByPhone app is available for Apple, Android, BlackBerry and Windows phones which means that the developers have to follow the coding guidelines for each device and submit separate apps to each store. This is why you sometimes see 'not available for Windows phones' as a message on some native app websites. Examples of native apps include Facebook and Shazam.

Hybrid app

These work across different platforms and are part native app and part web app. Hybrid apps run on the device and are written in web coding languages and are often a cut-down version of a website. Examples include Evernote, Twitter and Gmail.

Web app

These are not really apps but a website that looks and functions like an app. Web apps are internet-enabled and need a browser which means that in an area without internet access, they don't work! Examples include National Rail Enquiries and Trip Advisor®.

6.4.2 FINDING AND USING APPS

Apps are available either free of charge, for a cost, or for specific users and can be accessed via the app marketplace which includes: Apple App store, Google Play store, AppWorld and Windows store.

All apps are submitted to the app marketplace for approval by the marketplace owner. The marketplaces generate an income as a percentage of sales or from advertising revenue.

Google is helping with indexing apps (see Digital Tool: Google App Indexing) which could change how brands promote their apps. Essentially, application indexing is how search engines like Google record the content of mobile applications and they display this information in search results. You may have noticed results for in-app content in some of your Google search results and it's likely that this will continue.

Apps are often downloaded and used once or twice and then abandoned. As researcher Joy Armitage noted, 'Apps that have more relevant content and are easier to use will result in people using them more frequently' (Armitage, 2015, p. 22).

Digital Tool Google App Indexing

Go to <https://firebase.google.com/docs/app-indexing> and learn how Google indexes new apps in its search engine.

6.4.3 UNDERSTANDING THE APP DEVELOPMENT PROCESS

As marketers you may not be coding and developing new apps, although you need to understand the process as you may be responsible for briefing app developers.

It's an open secret that many apps never make it into the app marketplaces! They fail the basic requirements and are rejected, which means that organisations spend millions of dollars on wasted apps. Therefore it is critical that all elements are covered for three reasons: (a) the apps are accepted into the app marketplaces; (b) the apps gain user downloads; and (c) the apps gain usage. That's to say, if they're not in the marketplace they can't be downloaded, and if they aren't fit for purpose or have limited functionality, they won't be downloaded, and if they are downloaded, they need to be used.

The purpose of the app

The first stage in the development process is to understand the purpose of the app and why it may be needed. Are there other, easier solutions such as a mobile responsive website or online login area? What additional benefits does the app provide for the company? Having a clear vision at the start is critical. The purpose of the app may include:

- Save time and money by simplifying a work process
- Make tasks easier
- Gain user data
- Increase sales by simplifying the customer journey
- Generate income from advertising.

When reviewing apps Charmian Reynoldson and her colleagues noted that there could be two versions:

- Pro version – full version of an app available for a fee, with no limits on function, no advertisements and full technical support
- Lite version – free-to-download version, which may have limited functions and/or be supported by advertisements (Reynoldson et al., 2014, p. 901).

Reynoldson and colleagues' research explored the quality and usability of smartphone apps for pain self-management and they discovered that 'apps can be developed and marketed without regulation or guidance, which is a particular concern for apps used in health settings' (p. 908). This concerns the purpose of an app, and if it is simply a money-making vehicle, rather than a genuinely useful tool, it may gain less re-engagement as users seek greater functionality.

Target audience

Understanding who will use the app is key to later aspects of design and also to relevant content.

Two Belfast-based researchers, Anne Campbell and Mary McColgan, were exploring the development of apps for social work education and process. They started on the basis that 'mobile technologies are an integral part of students' lives' (Campbell and McColgan, 2016, p. 298). Having clearly defined their audience, one element they found invaluable was getting users to advise on the type of content needed.

Wireframe

Wireframes are online sketches of the functional elements in a web page or app. It is important to sketch these out as the marketing person creating the brief might have a long list of requirements for in-app functions and a wireframe shows the reality of how this looks. Seeing or visualising the design means that functions that are not critical can be removed, which contributes towards a more positive user experience.

Wireframes enable the development of the user journey (there is more about the user journey in Chapter 2, The Digital Consumer) as you can look at each step through the app. Wireframes are useful to content creators so they can plan the content outline for

Digital Tool Wireframes

You don't need to wait for the mobile app designers to create the wireframes as there are some free online tools that you can use and experiment with, to gain greater understanding of wireframes.

Try the digital wireframe and mock-up tools for yourself:

- balsamiq.com/products/mockups
- moqups.com

each page. Often the content arrives much later on; the use of wireframes encourages much earlier content development.

Have a go using the Digital Tool on the previous page and create your own wireframe!

Design

Jennifer Wang, a writer for *Entrepreneur*, interviewed the directors of an American app development firm who shared lessons in app building (Wang, 2012). Their advice on design included:

- Make sure the design is flexible, customisable and intuitive (p. 84).
- Every design element must be considered in terms of efficiency and functionality (p. 85).
- At the same time, the organisation's branding guidelines need to be followed or adapted so that the users recognise the brand in the app.

Development

Only after the purpose is clear, the audience has been agreed, the wireframes planned and the design considered, does the development begin. No coding should start until all these other processes have been completed and signed off.

The development phase is likely to include coding, which depends on the type of app being created. It also includes user management, especially if there are lite and pro versions. Customisation, which we could also call personalisation, also features in the development phase, where you work out what may be needed. As an example, Manuel Rivera and his colleagues in hospitality management investigated mobile services within a tourism setting and suggested that 'personalization services present great opportunities not only for tourists to customize their own experiences but also for local service and product providers to capture business opportunities' (Rivera et al., 2016, p. 2727). Therefore a tourism app with customisable location-based services could provide users with greater value and is more likely to be downloaded.

Other aspects of development comprise data integration so that any data or push notification functionality can be built in from the start. It is also necessary to explore how to synchronise data. If you think about tourism and hotels being added and possibly removed, on a regular basis, there should be a way to keep the app up to date.

User interface design and development

The next stage is user interface design and development. When the 'back-end' coding is done, what does the user see? Does it work? Is it as originally planned?

One app that failed on the user interface design was LinkedIn. The desktop app functioned well but the mobile app could be dangerous as you could explore someone's profile and connect without intending to!

Testing

There should be at least two rounds of testing – the initial testing then beta testing, and then more testing, all of which should lead to improvements. As Jennifer Wang's article in *Entrepreneur* mentioned, when any element is changed it needs to be re-tested as changes can create issues where there were none before (Wang, 2012).

Deployment

When the app is ready to go, it's time to release it to the world. The technical term is 'deployment' and this is about placing it into the agreed app marketplace. There are several factors to consider at this stage:

- Timing – are you submitting an app a month before major holidays such as Thanksgiving in the United States, Christmas in the UK or other festivals for your target audience? If the answer is yes, you will have to fight to get noticed as so many apps are released at these times. It is better to release before or after these times to gain greater visibility in the app stores.
- Reviews are critical to the success of an app so it may be shared with fans at an early stage to gain positive feedback: 'The more four and five star reviews you get at the beginning, the higher your app will rank on Apple's charts – and the easier it will be for people to discover your product' (Wang, 2012, p. 87).
- App store optimisation – ensuring that the app looks attractive to potential users when they explore the app marketplaces.

Promotion

As a marketer you will probably be responsible for the promotion of the app. Consider carefully the actions you will take to promote the app; this is often easier if you were involved with the initial design process.

Updates

One factor that keeps apps at the top of the charts is updates. When apps are updated, they are re-listed as new in the charts. Plan in advance the optimum timing for the updates. Apps that are not updated eventually stop working as they no longer function with software updates on the devices.

Measuring results

Where would digital marketing be without measurement? The longest-established provider of app metrics is Yahoo flurry. There are others, such as localytics.com, but Yahoo Flurry has significant longitudinal data to see how your app compares to others in the same market.

App analytics are similar to Google Analytics (see Chapter 13, Digital Marketing Metrics, Analytics and Reporting) and, for example, the data shows you:

- Session length – how long a user spends using the app
- Time in app – the total time in app over a specific period of time such as a week or a month
- Source of users – where they found out about the app and downloaded it; this could be via the app marketplaces, social media or elsewhere
- Retention – this is a big issue as many users download an app, use once and never again and retention shows the percentage of visitors who return after their first visit
- Lifetime value – how much you could generate from individual users – assuming that it's a paid-for, or has in-app purchases or sells advertising

Activity 6.3 Plan a Promotional Campaign for a New App

1. Look through the apps on your mobile and find one with some functionality – not a game – the type of app that you use that's useful.
2. Imagine you're working for a competitor to develop a new, better app that provides greater functionality.
3. Create a three-month promotional plan to launch the app in order to gain maximum positive reviews and downloads.
4. The plan should include a high-level overview of the promotional objectives as well as an action plan showing who will undertake which actions along with a budget to support the activities.

Case Example 6.2 Work Wallet™, the Health and Safety App for Business

Work Wallet is a mobile app and cloud-based system created by Greendog. It was specifically designed to reduce risk and blind spots in a business, giving employers full transparency of their whole workforce supply chain.

The key driver in this market was a change in legislation in February 2016. The new law changed the financial penalties for businesses for breaches in Health and Safety. The powers given to magistrates can result in fines ranging from £200,000 to potentially millions.

(Continued)

(Continued)

Work Wallet's 'Mobile First' service allows employers to provide their employees with up-to-date, real-time information, enabling a stronger information-sharing relationship between employer and employee, especially when managing employees working at off-site locations.

Work Wallet enables employees to:

- Receive notifications and reminders from management teams
- Receive the latest Risk Assessment Method Statement (RAMS) on site documents
- Use a location clock on/off service (in real time with GPS tracking)
- Track the status of Personal Protection Equipment (PPE)
- Report accidents and potential risks
- Use the Vehicle Management Suite (registered vehicles, scheduled inspections and accident reporting)

This system has the potential to save these businesses significant operational costs and make a real difference in improving workers' safety, ultimately saving lives in the process.

The smart technology in Work Wallet enables businesses to connect their office staff, remote workers and contractors, ensuring their workforce supply chain is Health and Safety compliant. If an accident does happen, the business has a fully auditable system to show the Health & Safety Executive (HSE), which can assist in providing evidence of actions in favour of the business.

See www.work-wallet.com

Case Questions

This is an example of a business app and these are often the most useful, saving time, saving costs or, as in this example, potentially saving lives.

- Consider a part-time or summer job where you may have worked. Did they have an app? If yes, what was the purpose of the app? How well did it work?
- If no, how could they have used an app to better manage the business?

6.5 MOBILE SEARCH

When people use a mobile device for a search, they usually need a result! As I mentioned in mobile advertising, if I am searching for a plumber, it's less likely to be for amusement and more often in desperation.

As with regular desktop or tablet searching, the mobile search provider will provide two types of results: (a) organic or (b) paid (see section 3.6.2 Search engine optimisation). Within these search results you may find directories, price comparison and review sites; this is often when the search term includes locations or dates.

Mobile searchers also use different places to search, which may include:

- Directories such as Google Places, Yahoo Local, Bing Places, Thompson Local, Yell, and in the United States people often use Yelp
- Price comparison and review sites which can be around specific themes such as holidays, and may include TripAdvisor®, Booking.com, Skyscanner or Kayak.

6.6 GEO-MARKETING AND BEACONS

Having reviewed mobile search functionality, the next step is the concept of geo-marketing and beacons. Geo-marketing is a way of describing geographically targeted marketing, which could include location-based searches as well as people 'near me now' with the iBeacon facility. This data is not always accurate, as these digital tools will show: whatismyIP.com, mylocation.org and google.co.uk/locationhistory.

6.6.1 iBEACONS

At a developer conference in 2013 Apple launched the concept of iBeacons which are a core-location feature that has been available on Apple devices since iOS 7 and is used to determine precisely where a device is located, even when the device is underground or otherwise out of decent signal range.

The technology uses BLE (Bluetooth Low Energy) as opposed to GPS, 3G or Wi-Fi data to locate the device, and any device featuring Bluetooth 4.0 can act as a beacon, meaning iBeacons are not restricted to Apple devices.

Applications of iBeacons

iBeacons allow shops, museums and many other destinations to install technology that can detect mobile phones that are nearby. This means that shops and museums could send relevant offers to passing consumers or welcome returning visitors.

Businesses have been slow to start implementing iBeacons, although some of the world's largest retail corporations are using the technology. Supermarket giant Tesco implemented iBeacons into its Click & Collect app to inform customers where to pick up their shopping upon arrival. Specialist supermarket Waitrose also used iBeacons to inform customers of its latest in-store offers and promotions from aisle to aisle.

Other ways that organisations could use iBeacons include:

- To serve offers and sale information in real time. This could include offers to be redeemed in store. US department store Macy's has been using iBeacons to alert customers of the offers and deals they have while they are in store.
- To deliver real-world remarketing as businesses could allow retailers to alert nearby customers that they have a product in stock that they had previously expressed interest in online. IKEA uses iBeacons connected to its Family app and can remind visitors to collect their free weekday coffee!
- To notify customers of the status of their click and collect packages. Woolworth's (Australia) have used geo-location technology to alert the store managers about the proximity of click and collect customers, allowing them to ensure orders are ready and customers need not wait or queue.
- To serve highly tailored demographics-based messages. With customer data collection high on the agenda for many retail businesses, it is possible that this data could be combined with in-store iBeacons to serve highly tailored messages to existing customers. Cosmetics chain retailer Sephora used this technique to offer nearby customers 15-minute makeovers if it was their birthday.

- Smaller businesses could benefit from using micro-location offers to encourage footfall.
- Local restaurants offering two-for-one deals on meals on Monday evenings could attract the attention of anyone walking past.

Beacons can track devices as they pass and deliver data including:

- **Event:** the type of event completed by the user (redeeming an offer, booking a restaurant table, collecting goods)
- **Number of devices per event:** a breakdown of how many devices have triggered each type of event
- **Number of devices per beacon:** the number of unique devices seen by each beacon
- **Devices over time:** the number of devices seen for a given time period
- **Number of devices per location:** the number of unique devices that have triggered an event for a specific location
- **Content delivered:** the content delivered with each event (offer, notification etc.).

If effective, beacons could be used as location-based loyalty programmes that know who I am, my preferences and my purchase history. This is ideal if I am visiting a regular coffee bar. This concept was trialled and failed as location services are not without challenges.

The app Foursquare was designed as an online loyalty card; you could check in to the location, they would be able to see your preferences and reward your loyalty. The most loyal customer was promoted to become the ‘mayor’ with special privileges. The challenge was that the geo-fencing was not robust enough and you could be somewhere other than in the location. As an example, when working in an office in Oxford Street in London I frequently checked into the café at Debenhams department store and even though I never visited the actual store, I was promoted to ‘mayor’. My privileges as mayor included free coffee on Thursdays. I didn’t quite have the nerve to turn up and say ‘Hi, I’m the mayor, your most loyal customer, and I’m here for my free coffee!’

6.7 QR CODES

Quick Response (QR) codes are small dots or pixels on a page, usually printed in a square shape. They are similar to barcodes and the main difference is that barcodes are restricted to 20 numbers whereas QR codes can store large amounts of data which means that when they are scanned, they show additional content such as: website details (URLs); contact information including business cards; and specific information or small videos about the product or location.

QR codes were invented by Denso Wave, a subsidiary of the Toyota Motors company, as part of their manufacturing workflow processes. QR codes could be created and attached to cars as they moved through the production line, so you could consider this as a car passport showing all tests that were completed before the car was driven off to a showroom for sale.

In their 2016 article ‘A review: QR codes and its image pre-processing method’, Anjali Singh and Parvinder Singh explained that QR codes are ‘readable by moderately

equipped mobile phones with cameras and QR code scanners' (Singh and Singh, 2016, p. 1955).

When initially introduced QR codes were popular within advertising agencies as they saw the potential to include so much additional product or service information. The challenge was that consumers were less keen and adoption was slow. Originally designed for the automotive sector, so that all product information was stored in one place, today they are used:

- In education – verifying students, especially for exams
- On some CVs – adding value with an 'introduction to me' video!
- In healthcare – delivering additional patient information for medics to read
- In museums and tourist attractions – providing background or more information about the exhibit or location
- At events and conferences – sharing the full conference guide
- On product packaging – giving more details about what's inside and ordering spares

There has been further marketing application of QR codes in social media with Snapchat, where you create your Snapcode that can be shared. Plus some virtual reality glasses include a QR code that takes the user through to a VR application. Plus QR code readers are becoming native to the camera app, in systems like Apple.

DISCOVER MORE ON QR CODES

The article 'A review on QR Codes: colored and image embedded' by Seema Ahlawat and Chhavi Rana (2017) provides a useful overview.

6.8 SMS TEXT MESSAGES

Short message services, or SMS, or text messages, have become more sophisticated with the development of multimedia message service (MMS) and with so many other mobile options, SMS is less used for mass marketing. One key factor is that text messages are personal communications and when used by organisations without permission, they are seen as intrusive. It is easy to stop or block text messages with smartphones and as initially there was a cost attached to sending or receiving text messages, they were used within the mobile phone package that people purchased. The advent of secure and free text messages within systems like WhatsApp enables users to send messages free of charge, as long as you have a Wi-Fi connection.

Organisations still use SMS for

- Appointment reminders – from the dentist, hairdresser
- Balance statements – from your bank and mobile phone provider
- Booking confirmations – from taxi firms
- Verification codes – from software packages

Another area where SMS has developed is for focused messages to specific target audiences. For this reason, SMS is popular in providing support messages related to healthcare at all levels, from smoking cessation to weight loss, from diet to mental health. Researchers Stephanie Spohr and her colleagues as well as Chris Nicholson have explored the benefits of SMS in health-related programmes (Spohr et al., 2015; Nicholson, 2017) and this research demonstrated the effectiveness of short communications as one-to-one support for health and personal issues.

Other researchers, Dimitris Drossos and his colleagues, reviewed many recipients of SMS messages and concluded that not all products are suitable for SMS due to the limited informational capacity as well as the context in which the user receives the message (Drossos et al., 2013). Their main findings were perhaps not so surprising as they commented that perceived ad credibility, attitude towards mobile ads, the message appeal and quality of the content tended to improve results. We could argue that the same applies for most forms of adverts.

In theory SMS could be used for location-based adverts; as you approached a store or restaurant you could receive a message, possibly containing an offer. The issue is that users would need to confirm acceptance and, as most apps include options for push notifications, we prefer to control how we receive these messages. It may be that we are used to our personally selected apps notifying us, but not to receiving texts from strangers!

FURTHER EXERCISES

1. Thinking about mobile ad fraud, how could smaller organisations avoid this so their budget wasn't wasted? How do you think the perpetrators should be punished?
2. Imagine you are working for a large organisation that uses an agency to buy their ads using programmatic systems. How do you ensure your organisation does not appear next to undesirable or irrelevant or offensive websites?
3. Write a brief for a mobile app. Identify its purpose and target audience. Support your proposal with research evidence.

SUMMARY

This chapter has explored:

- The mobile ecosystem and the benefits and risks for users.
- How the m-payment system functions.
- Different types of mobile advertising.
- Critical factors in planning and promoting apps.
- Wider use of mobile from geo-marketing to QR codes.

7

AUGMENTED, VIRTUAL AND MIXED REALITY

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** the different types of realities
- Apply** the technology readiness scale
- Analyse** experiential value
- Evaluate** the six dimensions of interactivity
- Create** an outline proposal for a VR or AR tool or app

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Construct an outline proposal for a VR or AR tool or app

7.1 INTRODUCTION

Augmented, virtual and mixed realities are moving into our everyday lives. From games to kitchen design, this chapter explains the differences as well as providing real-world case studies to see how organisations are applying these realities into their marketing mix.

Frameworks like the cuelessness model and technology readiness scale demonstrate how it can take years to evolve a concept into a business application. You will learn the key concepts surrounding augmented, virtual and mixed realities and understand its future.

7.2 COMPUTER-MEDIATED COMMUNICATION THEORIES

Computers can facilitate or mediate different forms of communication; we call this computer-mediated communication (CMC), a space where traditional verbal communication may be absent.

There are various theories surrounding CMC and in Chapter 11 on social media management we explore four of these that directly connect to how individuals present and disclose information online, as well as the type of media that has greatest impact. These four theories are: (1) self-presentation; (2) social presence; (3) media richness; and (4) self-disclosure.

7.2.1. CUELESSNESS MODEL

Part of the rationale for these theories is that through computer communication one factor that's removed is the face-to-face contact. In the past this was considered scary and meant all communication would fail, so in the 1970s and 1980s Nigel Kemp and Derek Rutter developed a framework called the cuelessness model which considered aspects of this concept (Kemp and Rutter, 1986). Their research disputed earlier notions that visual face-to-face contact was critical for social interaction. They hadn't heard of WhatsApp – well, to be fair, WhatsApp didn't exist back then, nor did smartphones. In some households you shared a main telephone with a neighbour because it was often the only fast way to get a telephone system into the house; it was called a 'party line' and you had to pick up the phone and listen to see if the neighbour was on the phone before you dialled. Honestly, at that time the only telecoms company in the UK – British Telecom – could make you wait up to *six months to get a phone!*

To test the need for visual cues, Kemp and Rutter based their work on field studies with visually impaired people. This was a smart way to prove or disprove a theory and working with the one audience that would always be missing the ability to see these cues.

Their work demonstrated that if there were the fewer social cues this increased psychological distance. They also found that the greater the psychological distance the more task-orientated and depersonalised the content. This sounds logical if you think about a telephone interview and how this can be stilted. It tends to be:

- a. task-orientated; for example, your first task is to get through this interview and the sub-tasks are to communicate your key skills.
- b. depersonalised content; for example, you may not want to tell the interviewer that you spend your weekends partying with friends – you need to keep it professional rather than personal.

At the same time, this is about context. If I'm speaking to friends, the content will be very different to speaking to work colleagues or tutors. Another researcher, Professor Sara Kiesler, investigated cues and how they could lead to other possibly unexpected benefits. Her work explored different technologies, including email and its lack of cues, and suggested new technology would mean that 'people will relate to one another in different ways' (Kiesler, 1986, p. 60). This demonstrates the adage that we adapt to our circumstances; we find a way through and often work on ways to improve the situation.

These different ways have evolved, as over time we have seen an array of developments in CMC, from internet relay chat (IRC) – which was like instant messaging via computers with really old screens and should have been called internet *delay* chat as it was so slow – to early versions of internet telephone calls (without video) that normally started with the shouty words 'CAN YOU HEAR ME?'

These technological developments lacked social cues. You couldn't see the person's expressions when they received the message or took the call. We have moved on significantly since then and, as you discovered in Chapter 2, the Technology Acceptance Model was an early mechanism for understanding how likely people would be to adopt new technology and is a way of identifying possible barriers to technology adoption.

7.3 THE DIFFERENT REALITIES

One technology that is gaining widespread use and adoption is virtual, augmented and mixed reality. You might think it's new to Snapchat, although it has been around for more than 50 years. In this chapter we will look at these different forms of reality, their application in different settings and how they work.

There is some confusion between the different types of realities and the Key Terms in this section define each one. Researchers Paul Milgram and Fumio Kishino defined **mixed reality** and provided a continuum, albeit a simplified version of the levels of reality, which illustrated the development of augmented, virtual and mixed realities, as shown in Figure 7.1.

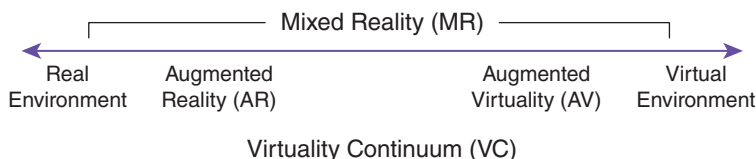


Figure 7.1 Simplified representation of a 'virtuality continuum'

Source: Milgram, P. and Kishino, F. (1994) 'A Taxonomy of Mixed Reality Visual Displays', *IEICE Transactions on Information and Systems*, 77 (12)/1323.

KEY TERM AUGMENTED REALITY (AR)

Ronald Azuma, whilst a PhD student, provided a lengthy definition of augmented reality (AR) as 'a variation of virtual reality' and he added that 'AR supplements reality, rather than completely replacing it' (Azuma, 1997, p. 356).

Fernanda Faust and her colleagues provided an alternative definition: 'Augmented reality can be defined as the superposition of virtual objects (computer generated images, texts, sounds etc.) on the real environment of the user' (Faust et al., 2012, p. 1164).

Although Azuma's definition was good, it was lengthy. The Faust definition is more akin to how we see and use AR today.

DISCOVER MORE ON COMMERCIAL RESEARCH INTO AUGMENTED REALITY

AugmentedReality.org publishes research into augmented reality and its application commercially. See www.augmentedreality.org/ar-market-research.

Virtual reality has existed for decades, as the timeline in Table 7.1 shows. Technology is often founded in science fiction and VR is no exception. Whilst early sci-fi writers imagined virtual environments, research labs have been working on VR goggles, which were initially termed 'Head Mounted Displays' (HMDs) and resembled a clumsy type of SCUBA mask for more than 50 years. The mask design doesn't seem to have changed much and it took decades from the early prototypes to get to the commercially available Samsung Gear, Oculus Rift and Microsoft HoloLens. One of the key reasons for this is the technology getting smaller, cheaper and easier to use.

Table 7.1 Virtual and augmented reality timeline

1950	Ray Bradbury's short story 'The Veldt' described a 'sentient hyper-realistic room'
1960	At the University of North Carolina virtual worlds research started with a focus on scientific and medical tools trying to work on medical imaging, X-ray specs
1962	Morton Heilig filed US patent #3,050,870 for the Sensorama Simulator, a multi-sensory enclosed cinema booth
1965	Ivan Sutherland created the first VR goggles, called a 'head mounted display' (HMD)
1969	Myron Krueger at the University of Wisconsin at Madison created the first responsive environment (in 1974 this was termed GLOWFLOW), an artificial environment where the walls and floor became immersive and sounds were created
1970	Myron Krueger creates METAPLAY, another responsive room but this time focused on interactivity
1977	Myron Krueger develops the responsive room which becomes VIDEOPLACE, a responsive environment with wall-sized video screens, where instead of wearing goggles, people would be immersed in the space
1984	William Gibson's book <i>Neuromancer</i> mentioned the concepts of Cyberspace and The Matrix

1985	Driven by a NASA project, the first system that combined goggles (HMD) and a glove that allowed the hand to move around in the virtual world was launched, named Virtual Environment Display system (VIVED) Jaron Lanier creates the first wearable 'computerised clothing' called the DataGlove
1987	The first full-body version of the glove, the DataSuit, was launched
1988	VIVED became VIEW, virtual interface environment workstation, with HMD goggles, glove and an element of voice control
1989	The VR system was developed with an auditory addition of earphones, called Convolvotron or the Head Related Transfer Function (HRTF) At the Association for Computer Machinery (ACM) Special Interest Group on Graphics (SIGGraph) Margaret Minsky, a researcher in the field of learning technology and haptic interfaces, demonstrated the first VR architectural walk-through Autodesk software started offering VR walk-throughs showing open-plan offices; the first iteration of Computer Aided Design (CAD) software
1992	The CAVE, a VR room, was created at the University of Illinois, Chicago Electronic Visualization Laboratory
2003	Second Life, an online virtual world, was launched by Linden Labs
2013	AR head-mounted display – Google Glass launched
2014	VR headset – Google cardboard launched
2015	VR headset – Samsung Gear VR launched
2016	VR headset – Oculus Rift and HTC Vive launched AR game – Pokémon Go launched for use on Apple and Android mobile phones
2017	VR headset – a consumer version of Microsoft HoloLens launched

KEY TERM VIRTUAL REALITY (VR)

In 1992 Jonathan Steuer reviewed earlier definitions of VR and extracted the key elements to create his own definition as 'a real or simulated environment in which a perceiver experiences telepresence' (Steuer, 1992, p. 76–77).

Eighteen years later, Daniel Guttentag observed that 'notable discrepancy exists regarding the definition of VR' and blended other suggestions and proposed a definition as 'the use of a computer-generated 3D environment – called a "virtual environment" (VE) – that one can navigate and possibly interact with, resulting in real-time simulation of one or more of the user's five senses' (2010, p. 638).

The Steuer definition was a move away from the focus on technology and about the user experience whereas the Guttentag classification was broader, encompassing more elements from the environment, its uses as well as the user experience.

KEY TERM MIXED REALITY (MR)

The main definition used comes from researchers Paul Milgram and Fumio Kishino, who worked on a taxonomy of mixed reality virtual displays in 1994. They suggested mixed reality was 'the merging of real and virtual worlds' (Milgram and Kishino, 1994, p. 1322).

Howard Rheingold's book *Virtual Reality* suggested the step changes for VR started in the 1980s as enabling technologies such as electronic miniaturisation and computer graphics developed further (Rheingold, 1992). The idea of a technology that enables a function is a critical concept in manufacturing. NASA and others use a concept called the Technology Readiness Level (TRL), which is described as a 'measurement system used to assess the maturity level of a particular technology' (NASA, 2012a). The idea is that any new technology project is checked against agreed criteria and then rated from 1 to 9 on a scale known as the Technology Readiness Scale (TRL). At TRL 1 some form of scientific knowledge has underpinned the concept and at TRL 9 the system has worked in an operational environment (NASA, 2012b).

DISCOVER MORE ON THE HISTORY OF VIRTUAL REALITY

Howard Rheingold has written many books on the concept of vitality and his book *Virtual Reality* (1992) is probably available in your university library's computer science section.

Figure 7.2 shows the Technology Readiness Scale, which is used by industry sectors such as defence and space.

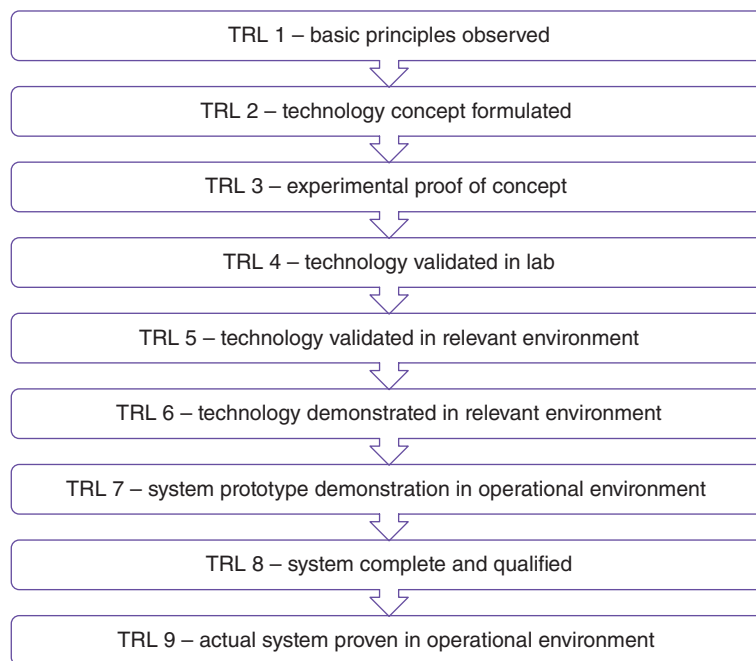


Figure 7.2 Technology Readiness Scale

If we think about VR goggles, they were at TRL 1, 2, 3 and 4 in 1960 with the work at the University of North Carolina. TRL 5, 6 and 7 were achieved in 1965 when Ivan Sutherland created the first goggles, but it wasn't until 2014 with the launch of Google Cardboard that VR goggles were complete and available – TRL 8 and proven with user feedback at TRL 9. It took 49 years for the technology to be fully ready.

Digital Tool Augmented Reality Live Patent Search

To explore the latest technology developments in AR, look at current patents published on www.augmentedreality.org/ar-patents, which shows you future plans to apply augmented reality.

Activity 7.1 Application of the Technology Readiness Scale

1. Using the items in Figure 7.2, apply the Technology Readiness Scale to a technology of your choice. It could be a piece of very new equipment or an older device.
2. Plot out when the technology reached each stage and if it is not yet at TRL 9 explain what the issue is.

See Template online: [Technology Readiness Scale](#)

7.3.1 VIVIDNESS AND INTERACTIVITY

Whilst at Stanford University working on his PhD, Jonathan Steuer wrote a paper to define virtual reality (Steuer, 1992). He observed that the words 'virtual reality' had emanated from a manufacturer of goggles and gloves (this is attributed to Jaron Lanier in 1987) and Steuer explored how VR had been described (see Key Term – **virtual reality**).

This was an important piece of work from which many theories have been launched. Steuer described the notion of telepresence as the idea of being there, via a communication medium. There were two core variables provided by the technology which impacted the user experience: vividness and interactivity, as shown in Figure 7.3.

Looking further into Steuer's framework, the first dimension of vividness, or richness, considered the stimulus and sensory information available from the medium.

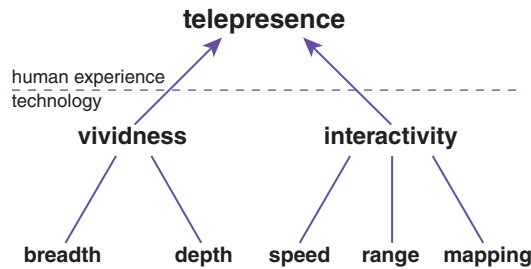


Figure 7.3 Technological variables influencing telepresence

Source: Steuer, 1992, p. 81

Within the breadth of the experience, this included whether sound and haptic functionality were incorporated. Steuer reflected on earlier work in communication systems which considered the five senses: sight (vision), hearing (audition), taste (gustation), smell (olfaction) and touch (haptic). VR could provide sight, sound and, later, haptic functionality. Morton Heilig, a pioneer in this area, created the ‘Sensorama Simulator’ (Heilig, 1962), which also incorporated smell! Since this time academics Victoria Henshaw and her colleagues have suggested that ‘non-visual senses such as smell can provide a more overtly immersive experience for the consumer of service environments’ (Henshaw et al., 2016, p. 154).

The second aspect of vividness was the depth, which concerned the image quality and speed. Steuer will have been aware that early VR systems had problems with lag as the imagery lagged behind and led to a stilted rather than immersive experience. The idea of a time lag as we would call this, is similar to early voice over internet phone calls, where there was always a delay of several seconds between one response and the next. Image quality and speed are intrinsic elements of what is referred to as media richness, which is discussed in Chapter 11, Social Media Management.

Interactivity investigated the speed, range and the mapping available for the user. Steuer explained interactivity as ‘the extent to which users can participate in modifying the form and content of a mediated environment in real time’ (Steuer, 1992, p. 84). Speed of interaction reflected on immediacy of response time, whereas the range was about the number of variations in the experience; the volume range for sounds, the image variety, the array of variables which could be altered. The final element within interactivity was mapping or how one body part, such as a hand or eye, could control or change the environment.

Much of the research conducted into VR has been applied to other technological applications, including wearable devices; the haptic quality of the latest smartwatches and mobile phones; the mapping within smartwatches so when the arm is raised, it can perform an action.

Some years before Steuer’s work, Carrie Heeter (now Professor of Media and Information) investigated newer technologies and their increased interactivity. She looked at previous work in this area and from this suggested six dimensions of interactivity which demonstrated the difference with new technology and the user’s involvement, which are shown in Table 7.2.

Table 7.2 Six dimensions of interactivity

Dimensions of interactivity	What this means	Application to virtual reality
1. Complexity of choice available	When more choice is available, the audience is smaller and users need to interact to decide which medium to choose	Deciding to select Google cardboard or Oculus Rift
2. Effort users must exert	The amount of effort that users make to access information	Ensuring goggles are charged before starting to use
3. Responsiveness to user	How responsive the medium is for the user	Whether there is a time lag in viewing VR content
4. Monitoring information use	New technology provides greater tracking of information accessed	All activities in a VR environment can be tracked
5. Ease of adding information	Users acting as the information source or content provider	Users can add comments to VR forums such as vrtalk.com/forum and forums.vrheads.com
6. Facilitation of interpersonal communication	Users can message and communicate with other users	In multiplayer games you can communicate with each other

Source: Adapted from Heeter, 1989

Applying this to different realities, the first dimension of interactivity about *choice* applies to games rather than other areas of realities. The issue here is that, in general, an external headset is needed to access VR and the choice of headsets is still limited, plus some games are restricted to specific headsets. Augmented reality may require an app or game to be downloaded and a mobile device. AR can function via web display ads and companies like Blippar are working on ‘augmented reality digital placement’, which allows users to tap on the banner and see the AR features.

Dimension two, *the effort users must exert*, still exists as it’s necessary to load the application, as well as gaining external headsets. However, the effort is being reduced with voice recognition. In augmented reality a device is needed to access the functionality. Equally this is becoming easier with regular push notifications or alerts about the game or app status.

The third dimension, *responsiveness to user*, is the one area that’s fast developing. As researcher Salah Alshaal and his colleagues commented, the progress with embedded sensor systems and microcontrollers that have been evidenced in wearable devices, could provide more interactivity for VR applications (Alshaal et al., 2016). In augmented reality, a good example is the Pokémon game where the characters depend on the user location.

Monitoring information use, the fourth dimension, is a rising concern as usage data from all realities is tracked from the moment the device is switched on. Big data (see section 1.6 and Chapter 13, Digital Marketing Metrics, Analytics and Reporting) has the ‘potential to worsen consumer privacy concerns’ (Hofacker et al., 2016, p. 95) and will fall under greater scrutiny with the advent of the General Data Protection Regulation (see Key Term – **General Data Protection Regulation (GDPR)**, p. 19).

The next dimension, *ease of adding information*, depends on the application. I mentioned big data, as users contribute data that might include: how long they use the application; with whom they interact; and devices used. It can also relate to content added on forums and product feedback areas.

Finally, the sixth dimension, *facilitation of interpersonal communication*, exists within multiplayer games as players can both message and interact with one another.

Having understood the different realities, the question is how these are applied, which we will explore next.

Ethical Insights Cyber Addiction

The concept of cyber or internet addiction was first suggested in France on an online forum as people appeared to be spending more time playing online games or in virtual worlds, which had an impact on their real environment.

Although it has not been completely accepted or recognised by all professionals (Suissa, 2015), Internet Gaming Disorder (IGD) has gained consideration by the American Psychiatric Association, who created a provisional criterion for IGD within the fifth edition of the *Diagnostic and Statistical Manual of Mental Disorders* (DSM-5). The lack of confidence in naming IGD as a formal disorder is based on the research to date and the Association has called for more clinical research to evidence the condition.

Activity 7.2 Internet Addiction Test

Explore the DSM-5 IGD criteria and questionnaire to diagnose internet addiction. If you answer yes to more than five of the nine questions, you may wish to seek help for internet addiction.

See Template online: [Diagnostic and Statistical Manual-5 IGD criteria and IGD questionnaire](#)

7.4 APPLICATION OF DIFFERENT REALITIES

Considering that it has taken over 50 years of ideas of different realities to reach a point where the hardware and software are readily available, the realities are used in many sectors, which we will explore here.

7.4.1 SPACE

Virtual reality has been used in space missions since VR started. Initially it was clunky, hence the need for the Technology Readiness Scale shown in Figure 7.3. Since 1989 NASA has run a dedicated 'VR applications program' and uses VR in hardware

development, operations development, support and missions operation training (Hale, 1995). It is cheaper and safer to train astronauts on the ground before they embark on a mission into deep space.

Using all the images gathered over time, NASA is also training interns to map Mars in VR (Foli, 2017). They can map out all aspects of the terrain, which enables scientists to better plan missions.

Case Example 7.1 Field Trip to Mars

The engineering firm Lockheed Martin operates in 70 countries worldwide and one of its key products is space systems, creating technology and communications between earth and space. They have been involved with all missions to Mars since the first spacecraft landed on the planet in 1976.

They wanted a way to engage with younger generations who may be less aware of their brand heritage and they needed a concept that was sustainable. Working with the ad agency McCann, they came up with the idea of creating an event around the Orion interplanetary spacecraft, which had taken its first flight. They decided to focus the event around the US Science and Engineering Festival in Washington, DC, which they sponsored. This event takes place every two years and over 50,000 children attend.



Figure 7.4 Lockheed Martin Mars Experience Bus

Source: Lockheed Martin

(Continued)

(Continued)

The idea developed into converting an old-fashioned American school bus and transformed this into a VR experience. The school children would visit Mars on the way to the science fair. They realised that giving the students individual VR headsets would isolate individuals and decided this should be a group VR experience and they needed a different approach. The team needed expert help and found Framestore, a British visual effects company, who sourced video screens with hidden LEDs and special film that could be used as replacement bus windows that could appear to be clear until a switch was flicked, when the view would change and the outside world would be transformed into views of Mars.

Framestore already had some 3D artefacts from films of Mars but they realised that they needed three different sensors as they all performed one aspect of the VR environment, but not the whole thing.

One of the greatest challenges was changing the regular journey from the school to the science fair into a trip to Mars. The team digitally mapped the route, which traversed some 200 square miles of the Washington area, and the route was programmed and adapted to make it look more like the Martian environment – which was difficult, as most roads in Washington are straight and well maintained, unlike the bumpy terrain of Mars!

Sound was added, with speakers giving some surround-sound noise, but they also needed some haptic properties or bumps. The easiest way to do this was for some of the team to hide in the back of the bus and jump up at specific times.

The first group of students went on a virtual reality field trip to Mars in 2016 and the new purpose-built Lockheed Martin Mars Experience Bus has since been created, which has been touring states in America.

Although this was a big leap in terms of application of a group VR program, it was similar to Myron Krueger's original vision of VIDEOPLACE in 1977.

One of the greatest contributions of the Field Trip to Mars project is how this has changed the way companies think about virtual reality and its application to business. The project has also demonstrated alternative ways of using VR for education, and unsurprisingly those working on the project have won many advertising and creative awards for innovation.

Watch the video at fieldtriptomars.com

Case Questions

Consider an organisation of your choice:

- How could a similar project to the Field Trip to Mars be used for this organisation?
- What would be required to make this happen?
- What would be the main advantages?
- What challenges would you anticipate in proposing such an idea to the senior management team?

7.4.2 MEDICAL

After space, medicine was one of the first sectors that saw the potential for the use of virtual and augmented reality. One of the difficulties in medicine is that practice and experiment often have to be on a real human and if they go wrong, it could be a matter of life and death. Medical applications for VR include human-patient simulators, which enable trainee doctors to trial their techniques on artificial people. No one dies. There are also immersive virtual reality Cave Automatic Virtual Environment systems (Huang et al., 2016) which allow trainees and experienced medics to explore inside the body.

Google Glass, which hasn't totally succeeded as an AR system, has worked well and been used in medical operations (Herron, 2016).

Google Glass didn't succeed at a consumer level for various reasons:

- Initially Glass were on sale for around £1,000 and there were stories about people being mugged for their glasses! Who'd wear them if you could become a victim of crime?
- They also didn't look that cool. You would feel very nerdy walking around saying 'Glass, what time is my next lecture'.
- There were too few applications for Glass when it was launched.

Yet, in medicine and healthcare, Glass may have a future. Research into trainee surgeons showed improved accuracy of needle placement when wearing Glass (Brewer et al., 2016); a study with physicians performing operations and accessing Glass to see X-rays remotely also worked well and an additional benefit was saving time as the X-rays could be sent direct to the Glass of all those involved (Spaedy et al., 2016).

7.4.3 RETAIL

Retailers have been keen to adopt virtual reality as they can see the application converting into sales. Trying before buying in an online or virtual or augmented reality could reduce the number of returns and improve online conversion rates (Dacko, 2016). So far it has been larger stores with budgets that have offered VR in-store and mainly as a method of building and sharing their brand ethos. For example, Topshop, the UK fast fashion chain, has experimented with virtual reality and introduced an in-store water slide, giving shoppers the chance to wear goggles, jump onto the dry slide and see the whole of Oxford Street, London's busiest shopping area, as they 'travel' along the giant VR slide. This funky younger brand introduced VR as a fun thing to do. In terms of experiential value this is playfulness (see Figure 7.5 Typology of experiential value) providing enjoyment and hedonic benefit of the shopping experience.

Another example is TOMS, the shoe store that donates a pair of shoes to a child in need for every pair it sells. They created a VR experience in several US stores, giving shoppers the chance to see 'A Virtual Giving Trip', sharing where the other pair of shoes went. You can watch the video with VR goggles on YouTube at <https://youtu.be/jz5vQs9iXCc>. This reinforced their brand values and brought to life their vision. This approach could be considered as 'consumer return on investment' as the consumer actively invests their money in a pair of TOMS shoes, knowing that they are buying another pair for a child in need (see Figure 7.5 Typology of experiential value).

Typology of experiential values

As traditional shopping becomes more of an experience, partly to compete with online shopping, researchers studied how shoppers gained experiential value. One group of researchers, led by Charla Mathwick, created a typology of experiential values, which was based on two axes: (a) intrinsic and extrinsic; and (b) active and reactive. The typology is shown as a matrix in Figure 7.5.

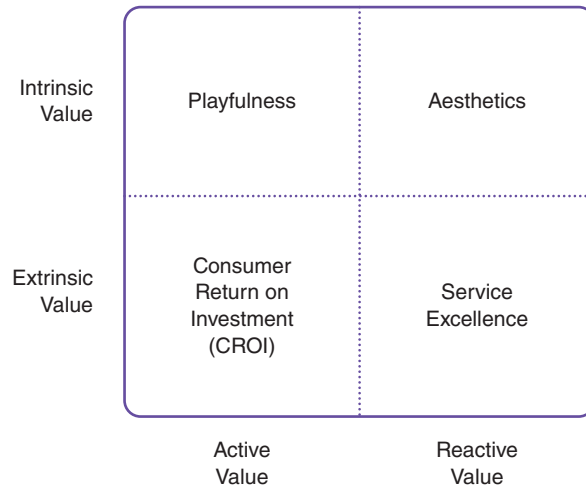


Figure 7.5 Typology of experiential value

Source: Mathwick et al., 2001, p. 42

The four quadrants signify different approaches to the experience influenced by internal and external factors:

- **Playfulness** (intrinsic and active): the enjoyment and hedonic benefit of shopping (see Chapter 2 for more on hedonic consumption).
- **Aesthetics** (intrinsic and reactive): how the consumer sees the retail environment, the photography and layout of the website.
- **Consumer return on investment** (extrinsic and active): this concerns the **utilitarian** benefit where the consumer actively invests their money (see Chapter 2 for more on utilitarian consumption).
- **Service excellence** (extrinsic and reactive): the consumer makes quality judgments against the service.

Table 7.3 Experiential value applied to retail examples of virtual and augmented reality

Example	Playfulness	Aesthetics	Consumer return on investment	Service excellence
IKEA launched a VR kitchen where users could walk around, change the design and peek into cupboards (Åkesson, 2016)	Feedback indicated users found it fun	Well presented and easy to access	Saved users time in trial building a kitchen before visiting the store	The app gained good feedback for its quality of imagery
L'Oréal introduced Make-up Genius, an AR app	Fun for users to add make-up to their image	Aesthetics are a critical factor with this app	Encourages users to try lots of make-up before purchase	The app doesn't yet have sufficient feedback
Nike Sneakers App includes access via AR of limited edition products	Fun to use	Aesthetics are a critical factor with this app	Allows consumers to access limited editions	Many good reviews online

Considering the application of VR and AR in the retail sector, we can test the typology against different examples, as shown in Table 7.3.

IKEA's use of the VR app to build a kitchen, as shown in Figure 7.6, allows the homeowner to walk around and decide what is and isn't needed. It brings the experience to life, making it real. It may also reduce the number of people returning goods after the sale has taken place.

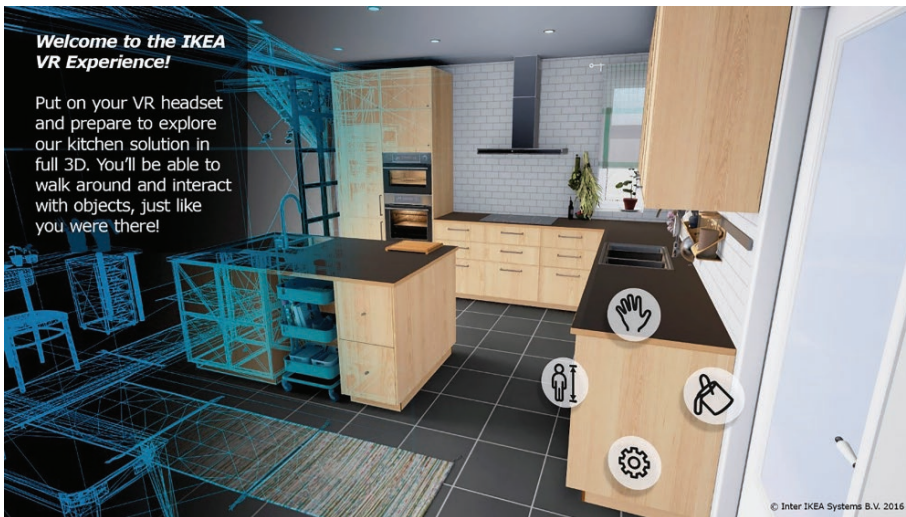


Figure 7.6 IKEA VR kitchen app

Source: With thanks to IKEA

Activity 7.3 Analysis of Experiential Value

1. Find a virtual reality or augmented reality shopping app (search online or ask friends).
2. Review the app and its functionality, and using Table 7.3 as a framework conduct an analysis into what works well and what does not work.
3. Compare your responses with others in the class.

7.4.4 EDUCATION

Virtual reality, augmented reality and mixed reality are used in many teaching scenarios; from science to geography; from geology to art (Curcio et al., 2016). This is one

area that has seen growth, starting with online learning tools such as virtual learning environments (you might use BlackBoard or Moodle at your university), and organisations like Google invest in virtual reality apps for education (see Case Example 7.2).

Case Example 7.2 Google Expeditions

Google spends a significant amount on research: as an example, at the end of 2016 it had 27,169 full-time employees working in research and development and spent nearly \$14 billion on research (Alphabet Inc., 2017).

One key area for Google is education and it has created Google Expeditions, a virtual reality field trip app. This allows teachers to take students on field trips – but from the classroom!

- It may be a geography class exploring South America, and students can take a field trip to Chile and visit Santiago and Valparaíso.
- It could be a computer science class covering the history of computing and visiting Bletchley Park in England to investigate (1) Second World War codebreaking; (2) Colossus – the world's first electronic computer; (3) The WITCH – the world's oldest original working computer; (4) 1960s and 1970s large system computers; and (5) personal computing, 1980s to the present.
- Or it might be an overseas visit to France that can start preparation with a VR field trip to Paris to visit key sites such as: the Arc de Triomphe, the Sacré-Cœur Basilica and The Louvre museum, before the real trip takes place.

The expeditions require two roles:

- Guide – this is usually a teacher or a parent. They manage the expedition and point out areas of interest and lead the field trip.
- Explorer – this is usually a student and could include parents who follow the expedition on their mobile device, watching the points of interest highlighted by the guide.

Expeditions require some kit to function (a tablet, virtual reality viewers, phones and a router to connect them all) and the free app can be downloaded for the expedition to start.

Google has also created an AR version that allows students to use their phones in the classroom. See more at edu.google.com/expeditions

Case Questions

- What do you think about the idea of virtual field trips?
- Have you participated in real-world field trips? If yes, what were the best and worst moments and why?
- What are the advantages and disadvantages of real-world field trips, compared to those in the virtual world?

7.4.5 TRAVEL

The travel sector has also embraced virtual and augmented reality with VR previews for travellers and AR wayfinding around airports and city guides.

One example of VR previews is the Thomas Cook Virtual Reality Holiday ‘Try Before You Fly’, accessed via Samsung Gear goggles in showcase stores in the UK, Germany and Belgium (Thomas Cook Group, 2014). According to the VR developer, early trials indicated ‘a 190% uplift in New York excursions bookings after people tried the 5 minute version of the holiday in VR’ (Visualise, 2015, p. 3) but this wasn’t a scientific test and we don’t know if these people had already decided to go to New York!

Gatwick Airport has installed 2000 beacons to enable augmented reality wayfinding (Gatwick Airport, 2017). Users can take their mobile phones to see where to easily locate specific destinations such as check-in areas and departure gates, as shown in Figure 7.7.



Figure 7.7 Gatwick Airport augmented reality wayfinding app using beacons

Source: Gatwick Airport

7.4.6 MANUFACTURING

Being able to view the inside of a machine has been around for some time. In the past the US Department of Defense created a Virtual Manufacturing Initiative (Novak-Marcincin, 2010). When I attended the Solidworks conference in Dallas there were many vendors promoting software for Solidworks computer-aided design systems that enabled engineers to look inside the machine. This meant that if there was an issue, they would be able to see any potential difficulties and resolve them before the manufacturing started. Industrial machines are expensive once manufacturing starts and VR enables a thorough check before the major investment commences.

In automotive manufacturing, augmented reality through Head-Up Displays (HUDs) or intelligent windscreens is available in luxury cars such as Cadillacs and BMWs. The HUDs provide details such as speed limits and details on available fuel. Land Rover launched a transparent bonnet virtual imaging concept with a ‘digital vision of the terrain ahead by making the front of the car “virtually” invisible’ (Land Rover, 2014, p. 1).

7.4.7 GAMES

The main area where all forms of reality – virtual, augmented and mixed – have seen major developments is in gaming. Entire businesses such as Steam have been established, making games available to download.

Smartphone Sixty Seconds® – Counting the Games

- Take out your mobile phone. How many games are on your phone?
- Who has the most games in the room and why?
- What are the most common games in your class?

Pokémon Go showcased how augmented reality works and Philipp Rauschnabel and his colleagues have explored this game, noting that after launch this was the most downloaded mobile game in 2016 (Rauschnabel et al., 2017). Rauschnabel and his team also created a conceptual model for an adoption framework for mobile augmented reality games, which is shown in Figure 7.8.

The rationale behind the creation of the model was there being no current theories that explain consumers’ reactions to augmented reality. This is probably as it has not gained full commercial traction, so there is little funding to research this area. Rauschnabel acknowledges that the model was based on earlier theories such as uses and gratification (see Chapter 13, Digital Marketing Metrics, Analytics and Reporting), which suggested that the users’ reactions and intended behaviours are based on their evaluation and perceptions of various benefits, risks and social influences. This is shown in the first two parts of the model. The next element is the users’ reactions, which looks at their attitude and behavioural intention – this takes us back once again to the Technology Acceptance Model (see Chapter 2, The Digital Consumer).

Rauschnabel’s research involved a survey of 642 German respondents who had installed Pokémon Go on a mobile device and who were paid to participate. The results indicated ‘that consumers’ attitudes toward playing mobile AR games are mostly driven by the level of enjoyment they receive and the image that playing a particular game conveys to other people’ (Rauschnabel et al., 2017). So there could be other issues with the research, as German Pokémon Go players might behave differently to players in the UK, the United States or China. However, in the absence of other frameworks, it is a useful place to start in considering the adoption of VR games.

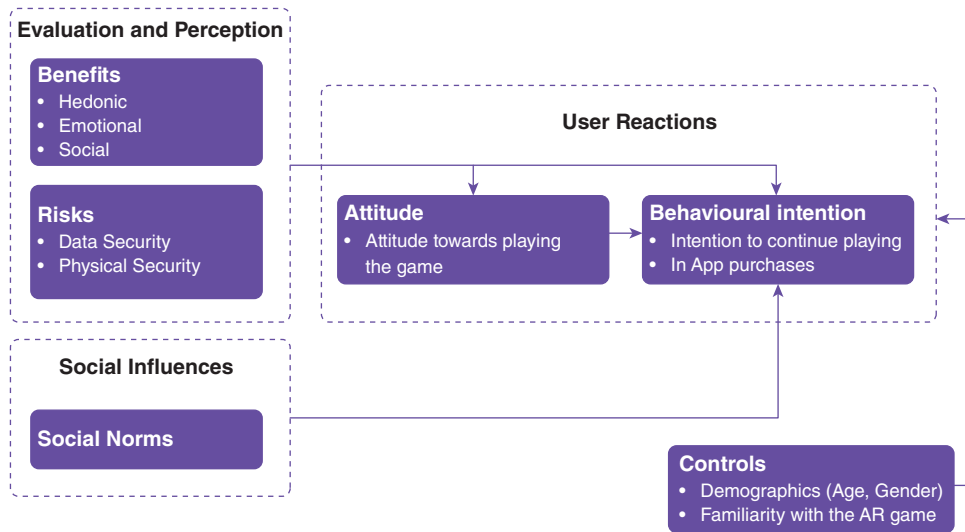


Figure 7.8 Conceptual model for an adoption framework for mobile augmented reality games

Source: Rauschnabel et al., 2017, p. 278

Ethical Insights The Flow Construct

How and when people play games can also be because they start a game and get into the 'flow experience', a key construct created by Csikszentmihalyi (1975) where the characteristics include: intense and focused concentration on the activity; loss of awareness of the surrounding space; and losing track of time (Csikszentmihalyi, 1975; Nakamura and Csikszentmihalyi, 2001).

Flow possesses an autotelic dimension where no goals are needed and there is no reward, other than being in that moment. In the flow state when the user or gamer feels their action opportunities are too demanding for the skill level, the experience is worry and at the extreme it becomes anxiety. When the skills are greater than the opportunities, this initially results in boredom and can result in anxiety. When the skills and opportunities are in balance, this creates flow where the gamer can play for hours on end, without noticing the elapsed time. (See also Ethical Insights: Cyber addiction.)

7.5 HOW REALITY WORKS

All the realities need devices. The equipment needed includes headsets, cameras, software development kits and creative software. This is one of the reasons that it is mainly larger companies or organisations with greater budgets, that are investing in virtual, augmented and mixed realities.

7.5.1 BENEFITS OF VR

Companies using VR claim specific benefits; some examples include:

- Engagement higher in VR than web
- Higher brand recall as brands are part of the experience
- Can get more data, such as gaze tracking and heatmaps
- Omni Channel opportunities to bring VR in as one of the channels
- VR is PR as brands adopting VR gain positive mentions online and offline

However, there is less research in this area and fewer companies adopting VR to confirm the accuracy or otherwise of these claims.

7.6 THE FUTURE OF REALITY

Access to smaller and cheaper technology and the state of ubiquitous computing mean that some forms of realities are likely to stay within the wider marketing mix. Added to this, a domain or sector tends to gain recognition when industry bodies are formed and in this sector several different bodies have been created, as shown in Table 7.4.

Table 7.4 Industry bodies

Organisation	Website	Members include
The VR/AR Association (VRARA)	thevrara.com	Membership with chapters worldwide
Virtual Reality Society	vrs.org.uk	An information and news resource for virtual reality and its related technologies
Global Virtual Reality Association	gvra.com	Google, Samsung, HTC Vive, Oculus, Sony Interactive Entertainment
The EuroVR Association	eurovr-association.org	Institutes, universities and academics
Augmented Reality	augmentedreality.org	Institutional supporters and individual members worldwide
The Augmented Reality for Enterprise Alliance (AREA)	http://thearea.org	Mainly commercial organisations

Another indication of a developing future is that at the annual conferences for the best-known tech companies – Apple, Google and Facebook – they all featured the realities.

- Facebook is keen to transform phones into VR headsets (sounds like Google Cardboard!)
- Apple has launched ARkit, a new framework that enables the creation of augmented reality experiences for iPhone and iPad
- Google has started Tango, a new AR computing platform. See get.google.com/tango

With major investment taking place by tech companies and with the development of so many new tools to use the realities, marketers may need to consider their application within their organisation. The application may not always be for customers; it could also be applied to staff training, as it is for NASA.

Students at university often have the opportunity to gain access to two VR tools: Aurasma and Blippar. If you do, make sure you take advantage of these opportunities as you can add a new specialist skill to your CV: 'Have used and applied AR software to create advertising campaigns'!

FURTHER EXERCISES

1. How do you feel about all your activities being monitored when wearing VR goggles? How should this be managed so that the usage isn't abused?
2. What application do you see for group VR experiences within organisations? What might be the advantages and disadvantages of these applications?
3. Construct an outline proposal for a VR or an AR app. Imagine you are working as a marketing manager in an organisation and several members of the management team are keen on the idea of VR or AR. This has been passed to you to explore and to develop an outline proposal.

See Template online: Construction of an outline proposal for a VR or AR app

SUMMARY

This chapter has explored:

- The cluelessness model and the flow construct and how these apply to technology and our lives.
- What the six dimensions of interactivity mean for virtual reality.
- The concept of cyber addiction and the need for more research in this field.
- How augmented and virtual reality are applied to different business settings to share information or help consumers.
- The benefits and possible future of the realities.

PART 3

DIGITAL MARKETING STRATEGY AND PLANNING

CONTENTS

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8

AUDIT FRAMEWORKS

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** how to adapt frameworks
- Apply** online brand consistency
- Analyse** online competitors
- Evaluate** corporate culture
- Create** an online digital marketing audit

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Create a micro-analysis
- Undertake a commercial competitor analysis
- Construct a digital marketing audit

8.1 INTRODUCTION

A digital marketing audit provides a solid foundation on which to build your digital strategy. It ensures you have a full understanding of the critical internal and external factors covering all aspects of the organisation before building a strategy and developing a plan.

This chapter shares the critical elements for a comprehensive audit that can be applied both online and offline. You will learn how to discover threats and opportunities before they emerge, with useful frameworks to structure your analysis.

8.2 WHY BOTHER WITH DIGITAL MARKETING AUDITS?

There is a temptation to press the button and start advertising on social media, build a website or develop an email campaign.

Please pause!

The social media campaign might miss the right audience, the website may not speak to your real target customers and the email campaign may render negative results. This often means campaigns need to be re-worked, more approvals are required and customers become irritated with too many of the wrong communications, plus the marketing budget is wasted.

A digital marketing audit provides a clear picture of the landscape in which you are operating, whether it's a bar or a software business. It highlights competitors, key issues in the sector and makes the team think about the worst case scenario – what could happen if?

At the same time, there are marketers who believe an audit is a waste of time and think that as change happens so quickly, it's better to learn to adapt instead. I have to hold my hand up here and say that I don't agree with that perspective. I feel that when carried out well, advance planning can predict potential changes and enable organisations to prepare. Plus there are other key benefits for you personally in conducting a digital marketing audit, which include:

- You build professional research skills
- You develop an audit process
- You gain greater commercial awareness
- You gain evidence of where the organisation is now
- You can better understand analysis and apply critical thinking
- You understand that digital marketing audit is the first step in an effective digital marketing plan

As Figure 8.1 shows, as step 1, the audit takes place before the strategy is created and long before the plan or tactical campaigns are launched.

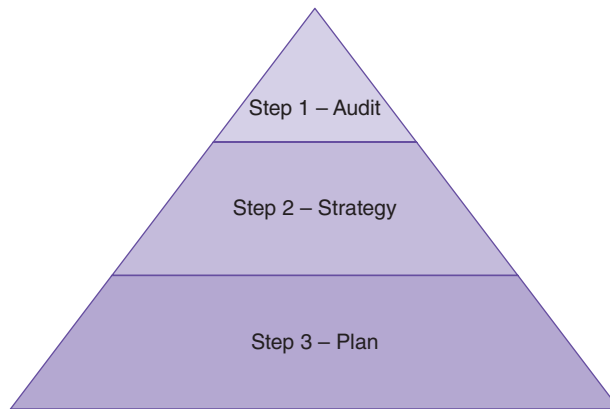


Figure 8.1 Digital marketing audit in context

The advantages for organisations of a digital marketing audit include:

- Saving time by ensuring the right tactics are used, based on evidence
- Providing a framework for the strategy
- Focusing the plan on what matters
- Saving money by only spending what's essential to achieve the goals

It may be that the audit doesn't discover everything, such as the stealth competitor that emerges out of the blue. But that's rare and if it does happen the audit presents you with options and a faster method of analysis.

An essential aspect of a digital marketing audit is the use of models and frameworks that provide a structured approach to gathering data, reviewing, analysing and comparing information, to arrive at effective recommendations.

It is useful to consider the place of the audit within an overarching framework and a useful model is MAOSTIC. Largely attributed to the Chartered Institute of Marketing, MAOSTIC was positioned as an introductory concept for marketing students. It looks at strategy and objectives within a wider context and stands for:

- M = business Mission
- A = marketing Audit
- M = marketing Objectives
- S = core Strategy
- T = marketing Tactics
- I = Implementation
- C = Control

MAOSTIC considers 'where are we now?' and to answer this question, it recommends starting with the business mission. This should be centred around the organisation's purpose and is placed at the start to focus the marketing audit.

With a clear picture of the current context, the model moves into exploring ‘where do we want to be?’ and after the audit the model recommends development of the marketing objectives, followed by the strategy, as do other models. Having worked as a practitioner for many years with hundreds of organisations, I think it’s easier to create the strategy first and then the objectives. The theory is useful, but in practice, what’s the point of creating objectives if the strategy hasn’t been decided? You might have very clear objectives, but if that doesn’t fit with the strategy, they won’t work.

Chapter 9 looks in depth at strategy and objectives, and once the core strategy has been decided, the model moves into marketing tactics, or the details that explain what has to be done, along with implementation, which addresses how this is done. This stage explains ‘how do we get there?’ and in Chapter 10, Building the Digital Marketing Plan, and Chapter 12 Managing Resources, we will explore these areas.

The last stage is control or ‘how do we ensure arrival?’, and is critical to gaining support from the senior management team if you are working in a marketing role. We will look at control in Chapter 13, Digital Marketing Metrics, Analytics and Reporting, as this has changed dramatically with digital marketing.

This chapter explores the contents of the digital marketing audit as well as key models and frameworks.

8.3 DIGITAL MARKETING AUDIT CONTENTS

Let’s jump straight in and explore the typical contents of a digital marketing audit.

8.3.1 ORGANISATION REVIEW/MICRO-ANALYSIS

The organisation review is also referred to as a micro-analysis and looks at your organisation in depth. Its purpose is to investigate the situation inside the business, as if you were an independent third party reviewing its health and welfare.

Whilst this is an internal review, there are two levels of information available: (a) internal data and (b) external data. Internal data may be available from the sales, accounts and marketing teams, which may include:

- Sales data: top customers and key competitors
- Accounts data: best-selling products or top performing services, lapsed customers, average order values and sales volumes
- Marketing data: number of daily, weekly, monthly web visits, top website landing and exit pages

Based on this data, an analysis can be constructed using a framework, model or construct. The advantages of using a structured approach include:

- A clear comparative analysis is possible between the organisation and its competitors.

- A benchmark is created which can be reviewed in six or twelve months' time.
- The review is easier to read and understand, especially if shared with other team members.
- Frameworks ensure all key factors are addressed.

And don't get tied up about which model to use! You could use any framework that works for you, as long as you are consistent and use the same tool for comparative analysis. Plus you can adapt models to suit your needs. In the next example, I use an adapted version of the 10Cs as the full version doesn't work for me and I will explain why.

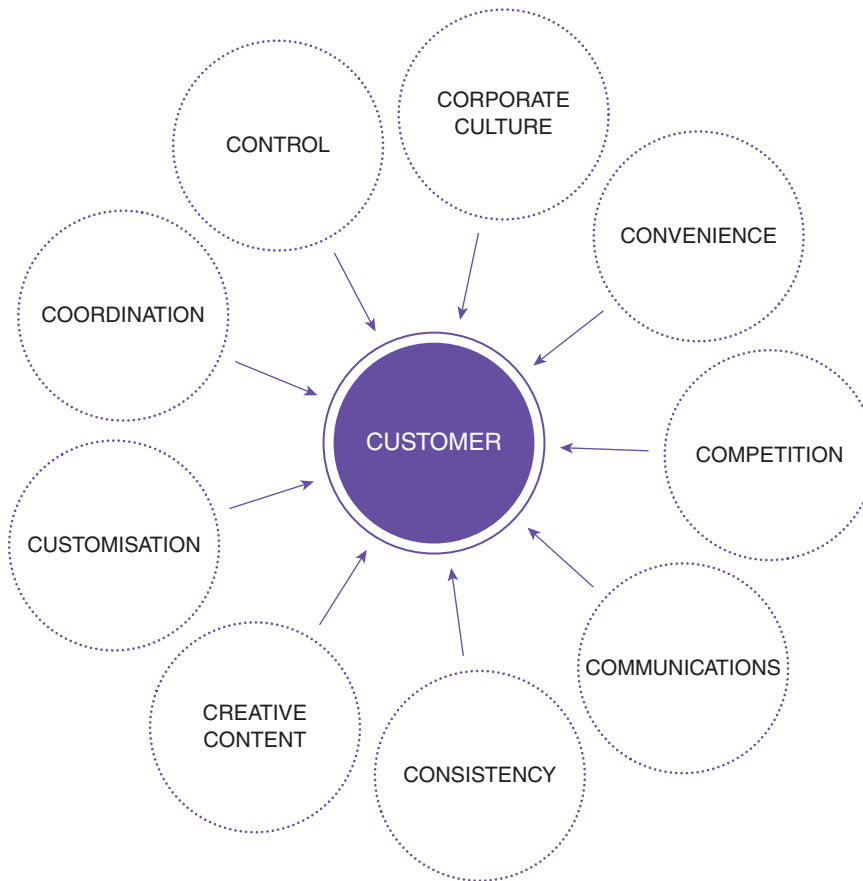


Figure 8.2 Ten Cs of marketing for the modern economy

Source: Gay, Charlesworth and Esen, 2007

8.3.2 THE 10Cs OF MARKETING

In 2007 Richard Gay, Rita Esen and Alan Charlesworth created the ‘Ten Cs of marketing for the modern economy’. Intended as a ‘useful framework for marketers assessing

for the modern digital marketscape from both an internal and external perspective' (Gay et al., 2007, p. 12), it is abbreviated as the 10Cs and can be used as an audit model.

The customer is at the heart of this model, as shown in in Figure 8.2, and there are nine further elements which are subsequently considered.

Whether you use the 10Cs as an audit model to consider your organisation on its own, or with specific competitors, it reflects some elements which may not be easy to find out. Let's study each element, along with specific questions to consider.

1. Corporate culture

Corporate culture is about the organisation's personality, what's acceptable and what's not, its core values inside and outside the business.

Corporate culture is especially visible online, where announcements of CEOs resigning as a result of an email or other online error are swiftly shared across social media; as researcher Shirley Leitch remarked, 'the internet has massively enabled information sharing' (Leitch, 2017, p. 1507).

Authenticity and transparency have become the digital indicators of corporate culture where brands can be exposed if bad news is being hidden (McCorkindale and DiStaso, 2014). Researcher Brad Rawlins suggested that the key traits within transparency were integrity, openness and respect (Rawlins, 2008, p. 95), which sounds reasonable until you consider the behaviour of various companies who have demonstrated a lack of integrity (the car emissions scandal from Volkswagen and others), lack of openness (leaks about client details being hacked via Talk Talk telecoms), lack of respect for women (using overtly sexualised and offensive images with an Elf in the discount retailer Poundland's Christmas campaign) and abuse of power (Oxfam staff engaging sex workers in Haiti).

Smartphone Sixty Seconds® – Searching for Trust

Since 2001 Edelman, a public relations firm, has conducted an annual survey of trust which is known as the Edelman Trust Barometer, sharing insights into feelings about trust in business, government and media. The findings are shared on its website.

- On your mobile phone go online and search for the Edelman Trust Barometer.
- What's the state of trust within business, government, NGOs and media?
- How has this changed in the last two years?
- Why do you feel this has changed?

2. Convenience

The element of convenience is straightforward to understand and is often used to describe the ease with which a customer can make a purchase.

Applied in a digital sense, one organisation that focused its business on customer convenience is Amazon, with the development of the one-click purchase. This has since extended into instant voice purchasing via Alexa along with the Amazon Dash button for simplified ordering (Farah and Ramadan, 2017).

Convenience can also relate to other conversion actions, such as how easy it is to download a document, register for a webinar or fill in the contact form.

3. Competition

The next 'C' considers your competitors, and Gay and his colleagues suggested that competition was on six levels:

1. Traditional competitors moving online.
2. New online-only entrants in domestic markets.
3. New online entrants from overseas.
4. Competitors from newly formed online alliances and partnerships.
5. Competitors introducing or eliminating channels of distribution.
6. Revitalised traditional businesses.

This is a broader consideration set than a simple competitor study and ensures marketers can identify both existing and emerging competitors. Whilst this is a useful checklist, as a way to better analyse the competition I have adapted the key features for the Template to undertake online competitor analysis that is available online.

See Template online: Online competitor analysis.

One challenge most businesses face is **disruptive marketing** (see Key Term and Discover More on Disruptive Marketing), where competitors who were previously unknown, suddenly appear, as if from nowhere. In a globalised market, competitors are more widely located and therefore an extensive search should be undertaken to identify emerging competitors.

KEY TERM DISRUPTIVE MARKETING

In 1996 Jean-Marie Dru published *Disruption: Overturning Conventions and Shaking Up the Marketplace* in which he defined the concept of disruption:

Disruption is about finding the strategic idea that breaks and overturns a convention in the marketplace, and then makes it possible to reach a new vision or to give substance to an existing vision. (Dru, 1996, p. 54)

In terms of how disruption is achieved, researchers Theresa Kirchner, John Ford and Sandra Mottner suggested there were eight contributing factors to disruptive marketing: financial resources, entrepreneurial leadership, creativity, agility, proactiveness, risk tolerance, internal cooperation and external cooperation (Kirchner et al., 2012).

DISCOVER MORE ON DISRUPTIVE MARKETING

There are not many academic journal articles that cover this area, but these two offer a useful place to start:

- 'Disruptive marketing strategy', by Tomas Hult and David Ketchen (2017), published in the *AMS Review*; and
- 'Disruptive marketing and unintended consequences in the nonprofit arts sector', by Theresa Kirchner, John Ford and Sandra Mottner (2012), published in *Arts Marketing: An International Journal*.

4. Communications

Social media has changed brand communications from the typical monologue and dialogue to triologue, where customers jump into conversations with other customers (Tsimonis and Dimitriadis, 2014).

The audit factor is understanding what's being said and where, especially with so many voices involved in the communication. Being aware of the conversations allows organisations to decide whether or not to participate and potentially manage any issues before they spin out of control.

Digital Tool Google Alerts

At a basic level, Google provides notification of when your organisation's name is added to a webpage or mentioned in an online article. These are called Google Alerts and are free of charge.

Visit www.google.com/alerts and add in the phrases you want to follow; add your email and you will be updated when new mentions occur.

5. Consistency

A key feature in branding, consistency is ensuring that the same service, the same message, the same tone of voice and the same use of imagery, is demonstrated across all online and offline platforms. In a digital environment this can be a challenge in two areas:

1. Where the online staff are aware of an offer that wasn't shared with the offline teams; and
2. Organisations with multiple sites (e.g. supermarkets, cafes, cinemas, hairdressers) where entrepreneurial local managers may decide to create their own content.

It is therefore critical to ensure all teams, online and offline, in all locations, have access to consistent messages and material.

Activity 8.1 Examination of Brand Consistency Online

Select an organisation of your choice or somewhere you are working.

1. Provide evidence of how the organisation manages brand consistency. Is there a policy or guidelines?
2. Is it clear whether all content is checked by one team or person?
3. Compare and contrast the online and offline content by analysing text and imagery from three different pieces of content online (e.g. web page, Instagram page, Twitter page).
4. How is the consistency evident?

6. Creative content

Thinking back to when the 10Cs model was created in 2007, this was a time when websites were expensive to create and therefore remained unchanged, often for several years. This is now rare, as it is easier to make incremental changes with website content management systems. The other major change since this model was created is the growth of social media platforms, meaning that organisations may have a ‘corporate face’ on their website, supplemented by an array of other, less formal information sources, as well as user-generated content.

To a certain extent this element duplicates the previous element, communications, so you may choose, as I do, to merge these elements when using this model.

7. Customisation

As websites contain many hundreds of pages it can be difficult to find exactly what’s needed. This means that web visitors arrive at the website, have a quick look and leave, seeking the item elsewhere. This is the rationale behind web personalisation and customisation, to immediately show potential visitors what they might be seeking.

Writing in *Internet Research*, researchers Mamata Jenamani, Pratap Mohapatra and Sujoy Ghose described ‘a scheme for providing personalized navigation structure (link-structure) to each user’ (Jenamani et al., 2006, p. 253), which is based on these factors :

- *User behaviour*: length of web visit, entry and exit pages
- *User’s interest*: navigational history of the past and current users.

These factors are available from Google or other analytics packages. Typically web analytics software will reveal the user behaviour and which pages they arrived at (entry pages), where they visited, how long they spent on the website and the exit page.

Data on the user's interest, such as how they navigated the site and when, is available via cookies (see Key Term – **cookie**, p. 42). Google Analytics and other packages provide a real-time view, which means that marketers can see who is on the website right now and where they are visiting.

Having this knowledge enables decisions to be made on improving the pages and personalising the experience. The personalisation manifests itself in 'recommendations just for you', based on your purchase and browsing history.

It has long been recognised that providing buyers with suggestions and recommendations on a website is effective in gaining attention (Ho and Tam, 2005). Other research explored greater online personalisation and a study by Professor Benlian (2015, p. 253) demonstrated that 'content and design personalization cues can increase users' attachment to a website'. If you consider websites you frequently visit, they may remember your purchase history and your preferences, including delivery locations. Customising your experience makes it a simplified shopping experience.

Personalisation and customisation are utilised by larger companies such as Amazon, Netflix and, in the UK, NotOnTheHighStreet. Table 8.1 shows the customisation techniques used by these companies.

Table 8.1 Customisation techniques

Customisation technique	Description
Analysis of past transactions	What did you buy? Because we don't want to show this to you again, unless there is an upgraded version.
Sample suggestions	Would you like to look at this?
Content filtering	What do you look at and what do you ignore?
Clickstream analysis	What is your journey or path through the website, what makes you click?

If you are working in a marketing department, the key questions to explore are:

- How is our internal data captured and utilised within our marketing planning?
- Does the organisation personalise its online offer? If not do we have the technology, skills and budget to deliver customisation?
- How do competitors use customisation on their websites?

8. Coordination

Coordination considers how well organised the purchase process is from start to finish and is now considered as part of integration as it concerns incorporating every aspect of the customer journey, from the initial enquiry through to the final product or service review. To a certain extent, coordination is superseded by the concept of the **customer journey** (see Chapter 2, The Digital Consumer).

In this context, coordination is like consistency. The lack of integration occurs when teams within the business are not connected, do not have the ability to speak with each other or perhaps in organisations where silos exist and each department does its own thing!

9. Control

The last element in the 10Cs considers control. In this model Gay and his colleagues commented that as the internet provided opportunities to test and measure it offered a form of control. We might call this 'fail fast' where an organisation experiments with advert #1 which doesn't work and moves onto advert #2 which is successful.

Control therefore represents measuring and monitoring, for greater visibility over what does and does not work (see Chapter 13, Digital Marketing Metrics, Analytics and Reporting), although it is difficult to analyse the control element within competitors.

Don't worry – we haven't forgotten the tenth C, the customer (see Figure 8.2).

8.3.3 THE DIGITAL 7CS FOR COMPETITOR EVALUATION

Having considered the 10Cs model and ruled out (a) creative content, which duplicates communications, (b) control, as it's difficult to assess competitors, and (c) replaced coordination with customer journey, we have a revised 7Cs model which I call the digital 7Cs for competitor evaluation. This comprises: corporate culture, convenience, competition, communications, consistency, customisation and customer journey.

Activity 8.2 Construction of The Digital 7CS for Competitor Evaluation

Based on an organisation of your choice, use the digital 7Cs for competitor evaluation and evaluate competitors to your chosen organisation. If any aspect of this model doesn't work for you, adapt it!

See Template online: The digital 7Cs for competitor evaluation

8.4 CUSTOMER INSIGHTS

Having understood factors within the organisation, it's time to delve into how the customer feels.

Understanding the customer is the essence of a successful organisation, although not all organisations bother to find out! When a customer initiates contact, the question

is, what are they seeking? Table 8.2 highlights the main reasons why customers make contact with organisations, along with examples and how to respond.

Table 8.2 Reasons why customers make contact with organisations

Reason for contact	Examples	How to respond
Seek information	To find out how something works, obtain dimensions or details about delivery	<ul style="list-style-type: none"> • Include list of FAQs on the website • Create 'how to' videos for popular requests • Offer Live Chat for quick responses
Request advice	More often on business websites, but can be a detailed information request	<ul style="list-style-type: none"> • Create 'how to guides' for selecting different options • Comparison tables • White papers with more detail
Register or subscribe	Registering for a newsletter or subscribing to product updates	<ul style="list-style-type: none"> • Keep it simple and request only what's essential
Place order/make purchase	Complete a sale	<ul style="list-style-type: none"> • Make it easy! • Store the basket for a future shop • Provide many payment options • Allow customers to store their details if needed

It's straightforward to capture the information for the 'how to' videos and other guides. These are the questions most frequently emailed to the customer service or sales teams!

Your internal sales data, questions to customer services and website analytics software may provide your team with some information. The gap in this is 'why' the behaviour has taken place and this may encourage further conversations with customers, which can take place in many ways, including:

- In a focus group
- Face-to-face, meeting individual customers
- Via online survey sent by email
- Online survey as a website pop-up request
- Ask Me Anything #SMS sessions via social media (see Key Term – **Ask Me Anything #AMA**).

KEY TERM ASK ME ANYTHING #AMA

The #AMA concept is said to have started in the social media platform Reddit and swiftly moved to Facebook where organisations hold #AMA sessions where customers, stakeholders and anyone at all can ask a question that will be answered online.

Reddit's original concept was that #AMA was an interview, intended for use by actors and celebrities, as they described on the web page:

Basically, /r/IAmA is a place to interview people, but in a new way. 'IAmA' is the traditional way of beginning the description of who you are; 'AMA' is the traditional way of ending

the description; the acronym means 'Ask me anything.' The interviewee begins the process by starting a post, describing who they are and what they do. Then, commenters leave questions and can vote on other questions according to which they would like to see answered. The interviewee then goes through and responds to any questions that he/she would like, and in any way that he/she prefers. (Reddit Editors, 2015)

Since starting, the #AMA has become a way of allowing organisations to share news with stakeholders. Typically an #AMA session lasts for a specified time, often one hour, although it is not uncommon for the threads and conversations to continue long after the session has ended.

Online surveys are popular as they are fast and inexpensive (Hooley et al., 2012). Plus, there are free tools such as poll daddy.com and survey monkey.com that can be usefully employed to capture the data.

They often appear as a website pop-up request as visitors arrive at, or leave, a web page. The downside is that many customers suffer survey fatigue and this has seen the growth of single question surveys like the Net Promoter Score® (Wedel and Kannan, 2016), which emails customers after a transaction has been completed (see Digital Tool: Net Promoter Score®).

Digital Tool Net Promoter Score®

The Net Promoter Score® (NPS), asks the customer only one question: 'How likely are you to recommend (name of company)?' and answers are scored from 1 to 10.

The number of detractors (those scoring 0 to 6) is subtracted from the promoters (those scoring 9 to 10) which provides a number out of 100, which is the Net Promoter Score®.

- See netpromoter.com

Evaluating customer insights can be undertaken as part of the organisation review and the critical factor is to ensure that an analysis or evaluation of customer insights could be easily assessed in 12 months' time, to understand what's changed and whether any improvements have generated results and achieved the organisation's objectives.

8.5 COMPETITOR REVIEW

All organisations have competitors! If you work in the third sector, within a charity or campaigning group, it may appear that there are no competitors as your organisation may have a very specific focus. However, all those organisations competing for a share of the wallet are competitors. If you operate in the same space, these are direct competitors; if a possible donor is considering your organisation or another that is completely different, this is an indirect competitor.

Even those working in the public sector, in government to consumer roles, have competitors. Typically, governments allocate budgets based on a range of political and economic factors. This means that if your government department or public sector body has experienced budget cuts it's because others have taken your share of the available funds.

A competitor review provides a benchmark of how others are performing. This stage of the audit involves a series of questions:

- What are the key digital strengths and weaknesses of the key competitors?
- How do competitors use digital marketing to acquire customers?
- How do competitors use digital marketing to convert customers?

Again, I recommend using a framework to compare like with like, to provide more objectivity and highlight potential gaps. Useful frameworks to conduct audits include:

- The 10Cs of marketing
- Forrester's 5Is.

The 10Cs of marketing (Gay et al., 2007) were considered in the last section, so I will demonstrate how to apply Forrester's 5Is in this section.

8.5.1 THE EVOLUTION OF FORRESTER'S 5IS

It is useful to understand the context as Forrester's 5Is was developed in 2007 and first appeared in a blog article by Brian Haven, part of the Forrester's research team (Haven, 2007). The concept was founded on the notion that organisations need to focus more heavily on customer engagement.

In marketing there have been debates for years about goods-dominant and service-dominant logic. The earliest models, like the 4Ps, were created at a time when manufacturing dominated marketing and the focus was on goods (McCarthy, 1964). By 2004 two researchers, Stephen Vargo and Robert Lusch, had created a firestorm by suggesting that the 4Ps were passé (Vargo and Lusch, 2004). They quoted earlier work from Day and Montgomery who diminished the 4Ps to a 'handy framework' (2004, p. 1). Whilst Booms and Bitner added three further Ps to the marketing mix, it was (and is) still a goods-oriented model (Booms and Bitner, 1980).

To develop a services model Vargo and Lush reviewed much of the existing marketing literature and proposed a services-driven approach, which stepped away from traditional marketing frameworks. The new concept was called Service Dominant Logic (see Key Term), which was the precursor to customer engagement and frameworks like the 5Is.

KEY TERM SERVICE DOMINANT LOGIC

Vargo and Lush (2004) defined Service Dominant Logic (SDL or SD-logic) as a 'reoriented philosophy that is applicable to all marketing offerings, including those that involve tangible

output (goods) in the process of service provision' (p. 2). In SDL there is a fundamental change regarding the concept of resources:

- Operand resources – those on which an operation is performed to produce an effect, the 'goods'.
- Operant resources – those that produce effects and include 'core competences and organisational processes' which are often invisible and intangible (p. 3) and are also referred to as 'skills and knowledge' (p. 2).

The 'service-centred' view was described as having these attributes (p. 5), which included recurring themes in the evolution of marketing, and these are highlighted in bold typeface:

1. Identify or develop **core competences**, the fundamental knowledge and skills of an economic entity that represent potential competitive advantage.
2. Identify other entities (potential customers) that could **benefit from these competences**.
3. Cultivate relationships that **involve the customers** in developing customised, competitively compelling value propositions to meet specific needs.
4. Gauge **marketplace feedback** by analysing financial performance from exchange to learn how to improve the firm's offering to customers and improve firm performance.

DISCOVER MORE ON SERVICE

DOMINANT LOGIC

Useful articles include:

- The original article proposing service dominant logic: 'Evolving to a new dominant logic for marketing' published in the *Journal of Marketing* (Vargo and Lusch, 2004).
- A review of the original proposal: 'The evolving brand logic: A service-dominant logic perspective' (Merz et al., 2009).
- A follow-up article: 'Service, value networks and learning', published in the *Journal of the Academy of Marketing Science* (Lusch et al., 2010).
- A useful third-party review article: 'The evolution of service-dominant logic and its impact on marketing theory and practice: A review', published in the *Academy of Marketing Studies Journal* (Zinser and Brunswick, 2016).

Having considered the concept of service dominant logic, the natural extension was to further involve the customer, one of the early themes noted by Vargo and Lush. This is echoed in the 10Cs framework, where the individual is placed at the

core and in the 5Is, the customer, or individual, was the first 'I', around whom the model is centred. As shown in Figure 8.3, the remaining four 'I's focus on the level of involvement, interaction, intimacy and influence that an individual has with a brand over time.

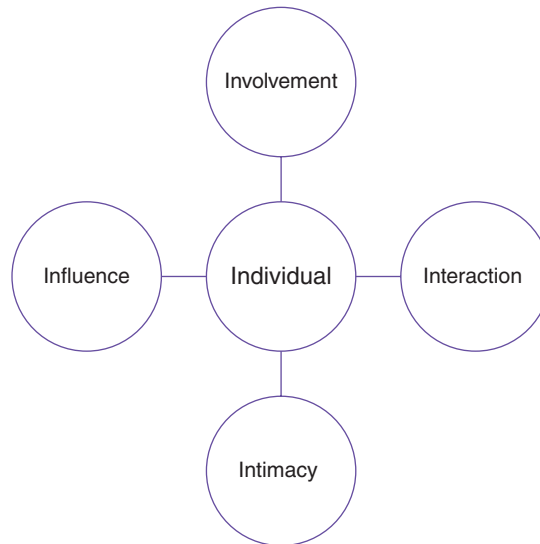


Figure 8.3 Forrester's 5Is

Source: Adapted from Haven, 2007

The 5Is was created in a digital environment and I have adapted the model to analyse social media:

- Involvement – this considers the number of fans, strength of the audience size.
- Interaction – this considers the number of mentions, or comments or shares.
- Intimacy – as this is about the nature of the relationship between the firm and its audience, I have suggested this focuses on sentiment and whether it is positive or negative.
- Influence – this considers the online word of mouth, such as reviews, recommendations and write-ups.

8.5.2 APPLICATION OF FORRESTER'S 5IS

Having adapted the framework, let's work through Case Example 8.1 of British Airways' use of Twitter, where Table 8.3 shows an evaluation of their strengths and weaknesses.

Case Example 8.1 British Airways' Use of Twitter

Table 8.3 Evaluation of British Airways' current digital marketing methods

5Is	Strengths	Weaknesses
Involvement (number of fans)	Over 1 million fans on main Twitter page	There are three Twitter pages, which is confusing The Twitter page does not explain who manages the account and it lacks authenticity
Interaction (number of mentions, comments)	Staff manage social media in a formal way (Canhoto and Clark, 2013)	Responses are formal and do not always provide a resolution (Öztamur and Sarper Karakadilar, 2014)
Intimacy (positive, negative sentiment)	Staff add their names after tweets, trying to provide greater intimacy, although this does not always resolve the issue (Baird and Parasnis, 2011)	Unhappy customers badmouth the company publicly via Twitter (Gregoire et al., 2015)
Influence (word of mouth including reviews)	Happy customers post good news via Facebook (Gregoire et al., 2015) and co-create brand stories (Gensler et al., 2013)	Customers are passed on to another part of the business, resulting in potentially negative reviews, e.g. Hi, we're sorry you're having difficulty doing this. Please try this link to report it, http://ba.uk/wsaSCA .

The evaluation demonstrates that there are gaps in the management of their current digital marketing methods and practices. Having three Twitter accounts indicates a lack of control or perhaps awareness? The lack of resolution of customers' issues highlights that there is no evidence British Airways have developed a strategy for managing positive word of mouth (Williams and Buttle, 2014).

Case Questions

- Can you extend and amplify this evaluation starting with the academic references provided, which could be developed and investigated further?
- Can you explore British Airways' online presence and develop the commentary?
- Does it matter that British Airways has three Twitter accounts? If yes, how could this be resolved?

Activity 8.3 Evaluation of the 5Is

Using an organisation of your choice, explore the organisation's online presence and evaluate their strengths and weaknesses using the 5Is.

8.6 MACRO-ENVIRONMENT ANALYSIS

A macro-environment analysis considers issues outside the organisation, which in theory are beyond the organisation's control and are located within the wider market situation.

The best-known frameworks in this context are probably PEST or PESTLE, which are mnemonics which stand for Political, Economic, Social, Technological, Legal and Environmental. If the 4Ps are dead, perhaps so too is the PESTLE model! In 2006 George Burt and his colleagues reviewed PESTLE (also called PEST, STEEP – it all depends on your tutor) and suggested there were limitations to using the model, not least of which was trying to define what the environment was. Effectively their revised model starts with a PEST and explored elements in more detail and planned what could happen (Burt et al., 2006). Whilst it's a useful notion, it still starts with a PEST, which we will look at here.

PESTLE is often used to inform a **TOWS matrix** (see the TOWS Matrix in Chapter 9, Strategy and Objectives) and provides an essential contribution towards a digital marketing audit. I think George Burt missed the TOWS element of PEST and how that could better inform organisations as to strategic future options. Rather than listing the PESTLE factors, Case Example 8.2 shows the digital PESTLE for an online fashion brand, ASOS. It takes each element and considers the digital threats and turns these into digital opportunities.

Case Example 8.2 ASOS Digital Pestle

Using the online fashion brand ASOS as an example, let's explore in Table 8.4 how PESTLE can be used as an evaluation tool to review digital opportunities and threats.

Table 8.4 Digital PESTLE used as an evaluation of opportunities and threats

PESTLE factor	Digital threats	Digital opportunities
Political	Skilled digital workers may need to leave the UK as it leaves the EU	Establish remote working facilities in key locations to retain the skills
Economic	Higher taxes may be imposed to sell online goods in different countries; the full impact of the UK's decision to leave the EU is still unknown (Mintel, 2016)	Create micro-sites to address larger customer bases in Europe
Social	Consumers may start renting clothes instead of purchasing outright as relationships to possessions change (Bardhiet et al., 2012)	Trial a rental option for certain clothes and accessories

PESTLE factor	Digital threats	Digital opportunities
Technological	Competitors may partner with voice recognition systems and the novelty may lead to customer attrition	Research the Internet of Things to better understand opportunities (Hoffman and Novak, 2016). For example, how to partner with voice recognition systems such as Amazon Echo (Alexa) and Google Home, so that shoppers can be advised when new stock is added to the website
Legal	EU legislation such as the General Data Protection Regulation (GDPR) (Regulation (EU) 2016/679) may impact how online newsletters are issued	Ensure customer data acquisition and usage comply with the GDPR
Environmental	Taxes may be imposed for delivery costs direct to the doorstep	Reduce carbon footprint by embracing open market delivery stations, such as Amazon lockers, for mobile customers (Shankar et al., 2016)

Case Questions

- Considering the digital opportunities for ASOS, which should be prioritised? Identify two of the top priorities to address now.
- What is missing from this evaluation? Can you add further threats and turn them into opportunities for ASOS?

Whilst Table 8.4 provides an outline of how to use PESTLE as a digital evaluation of opportunities and threats, for a rigorous digital marketing audit you would:

- Add more commentary about specific issues raised
- Connect back to customer feedback received
- Provide more evidence to support the claims
- Prioritise the opportunities to consider first.

FURTHER EXERCISES

1. Using a framework, conduct an organisation review and micro-analysis which identifies gaps in the organisation's internal and external research.
2. Select an organisation of your choice and conduct a digital macro-environment analysis using PESTLE, highlighting the strengths and weaknesses of the findings.

SUMMARY

This chapter has explored:

- The rationale and benefits of a digital marketing audit.
- The range of models and frameworks that can be used for conducting a digital marketing audit, such as the 10Cs and Forrester's 5Is.
- Methods of collecting third-party data for analysis.
- Online methods of gaining customer insights.
- How to adapt traditional marketing models such as the environment scanning PESTLE to consider digital ecosystems, exploring the online environment in more depth.

9

STRATEGY AND OBJECTIVES

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

Understand the difference between strategy, objectives and tactics

Apply the TOWS matrix

Analyse the organisation's acquisition, conversion, retention strategy

Evaluate objectives using the REAN framework

Create a strategy

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Create a strategy for an organisation
- Develop digital marketing objectives for an organisation

9.1 INTRODUCTION

Digital marketing strategy can seem complex and very much focused on tactics. Often interpreted as a Facebook campaign or blog creation, digital strategy is so much more. A successful strategy is based on evidence and in Chapter 8 you will have conducted a digital marketing audit, identifying what works and what doesn't, gaining a better understanding of the overall context.

In this chapter we will explore different concepts, including digital strategy models plus details on the hierarchy of objectives. At the end of the chapter you will better understand what's needed to create an effective digital strategy.

9.2 STRATEGY AND TACTICS

Strategy and tactics are often confused. You will hear someone saying their strategy is 'Facebook advertising'. That's absolutely not a strategy! It's a single tactic!

Digital marketing strategy is about more than tactics and lists of actions. Strategies require a clear and strong vision. They set the direction for the organisation and are often designed to be in place for several years. A strategy that's changed every six months causes confusion, wastes money and sends out the wrong messages to the target audience.

- **Strategy** is a plan or programme, to achieve your aim or vision.
- **Objectives** are detailed SMART (specific, measurable, achievable, realistic and timed) goals.
- **Tactics** are actions to achieve the objectives.

It is not uncommon for organisations to confuse strategy, objectives and tactics (see Key Term – **strategy**).

KEY TERM STRATEGY

There are several definitions of strategy, which are similar and focus on an overarching plan.

A marketing leader from the past, Wendell R. Smith, described strategy as 'a program designed to bring about the convergence of individual market demands for a variety of products upon a single or limited offering to the market' (Smith, 1956, p. 5).

Philip Kotler offered a complex and scientific description: 'the marketing strategy is the set of decision rules, or program that adjusts (product price, advertising budget, distribution budget) from period T to period T + 1, for all T' (Kotler, 1965, p. 104).

Michael Porter suggested that 'A formal corporate strategy provides a coherent model for all business units and ensures that all those involved in strategic planning and its implementation are following common goals' (Porter, 1997, p. 12).

Henry Mintzberg adopted a more straightforward approach and said 'strategy is a plan' (Mintzberg, 1987, p. 11).

9.3 THE ORIGINS OF STRATEGY

Strategy, along with many marketing concepts, is founded on military theory. Armies and their generals needed clear and decisive strategies to go into war; if not, with hundreds of soldiers walking around with weapons, there would be total chaos.

The Art of War, written around 2,500 years ago by Master Sun (Sun Tzu), described key tenets of strategy. Several expressions from the book are commonplace and demonstrate the values of leadership, propaganda and a good competitor audit, for example:

- Leadership – A leader leads by example, not by force.
- Propaganda – The supreme art of war is to subdue the enemy without fighting.
- Competition – Keep your friends close and your enemies closer.

Historically, strategy focused on leadership or share within markets, competition and product offers. It wasn't about the customer, it was about beating the competition and gaining maximum market share.

Marketing's original focus was very much on making and selling products on the basis that if you made it, you could sell it. Researchers V.K. Kumar and Roger Kerin explored the evolution of themes in marketing, as shown in Table 9.1 (Kerin, 1996; Kumar, 2015). Kerin started the table, which was developed by Kumar to add in the post-1996 content. Unsurprisingly, at its inception the issue was about defining the nature of marketing and developing key principles and ideas. This progressed into positioning marketing as a management discipline which morphed into marketing as a science.

Marketing as a science elevated its importance. But beware, this is a hot potato! Opinion is divided: some see marketing as an art, others see it as a science (see Discover More on Marketing as Art or Science). I see marketing as an art and digital marketing as a science, and that's not popular with everyone.

Table 9.1 Themes and metaphors in marketing

Timeline	Prominent theme(s)	Predominant metaphor
1936–1945	Illuminating marketing principles and concepts	Marketing as applied economics
1946–1955	Improving marketing functions and system productivity	Marketing as a managerial activity
1956–1965	Assessing market mix impact	Marketing as a quantitative science
1966–1975	Uncovering buyer and organisational processes	Marketing as a behavioural science
1976–1985	Crafting market/marketing strategy	Marketing as a decision science
1986–1995	Identifying market/marketing contingencies	Marketing as an integrative science
1996–2004	Customer profitability studies and resource allocation efforts	Marketing as a scarce resource
2005–2012b	Marketing accountability and customer centricity	Marketing as an investment
Emerging (2013–present)	Marketing at the core and new media influence	Marketing as an integral part of the organisation

Source: Kumar, 2015, p. 2 *Journal of Marketing*

DISCOVER MORE ON MARKETING AS ART OR SCIENCE

An irreverent writer on the topic of marketing as art or science is Professor Stephen Brown from Ulster University. His writing is entertaining and often linked to pop hits of the 1980s and 1990s as well as *Star Wars*. He also has an ongoing battle with the American marketing great Professor Philip Kotler, whom he likens to Darth Vader. Brown positioned himself as Luke Skywalker, saving the world from marketing science.

There is a bit of history here too. In 1997 Stephen Brown was a guest editor of the *European Journal of Marketing*. Presumably for a bit of sport he decided to write an article called 'Kotler is dead' when Philip Kotler (known as the god of marketing in the United States) was very much alive and well. Brown went one stage further and did not add his own name to the paper and instead created a pseudonym, let's call it a persona, named Alan Smithee of Alloa Metropolitan University, Alloa, UK. Where? Exactly! The opening line is 'Bastards!' and this sets the tone for a dialogical rant about marketing as a science. It also established a long and entertaining relationship between Stephen and the professor he calls 'Phil baby'.

I hear, from a very reliable source, that Phil baby sends Brown an annual email, reminding him that he's still alive and kicking, recounting how many hundreds of thousands of marketing books he's sold that year, and asking Stephen for a response about how few he's sold.

For entertainment and to learn about the history of marketing, see for example:

- 'Art or science? Fifty years of marketing debate' in the *Journal of Marketing Management* (Brown, 1996)
- 'Kotler is dead!' in the *European Journal of Marketing* (Smithee, 1997)
- *Postmodern Marketing Two: Telling Tales* (Brown, 1998)
- And I would also recommend a newer book on brands, *Brands and Branding* (Brown, 2016), as this explains the background, components and place of branding in marketing.

9.4 TRADITIONAL STRATEGY MODELS

Table 9.2 lists well-known strategy models, the author, when the model was created and an overview. If you want to find out more on these, many are covered in traditional marketing textbooks, although I will explore the TOWS matrix in more detail as this is a useful tool to identify strategic options.

Table 9.2 Strategy models

Model	Author	Date created	Overview
Product differentiation and market segmentation strategy	Wendell R. Smith	1956	Smith viewed product differentiation and market segmentation as being based on supply and demand
Growth strategies for business	Igor Ansoff	1957	Useful framework, often considered to be too simplistic

Model	Author	Date created	Overview
Diversification strategy	George Steiner	1964	Main focus was company acquisition as a diversification strategy rather than product or market acquisition
Forces driving industry competition	Michael E. Porter	1980	Focus moved from the introspective individual business unit to its wider environment and five external forces
Application of generic strategies	Michael E. Porter	1980	From the forces driving industry competition Porter identified three generic strategic options: (a) cost leadership; (b) differentiation; and (c) focus
The TOWS matrix	Heinz Wehrich	1982	Extracted the strategic options from a SWOT analysis
Five Ps for strategy	Henry Mintzberg	1987	A management rather than marketing focus: Plan, Ploy, Pattern, Position and Perspective
MAOSTIC	Chartered Institute of Marketing	2004	Part of the traditional marketing process: business Mission, marketing Audit, marketing Objectives, core Strategy, marketing Tactics, Implementation, Control

Smartphone Sixty Seconds® – Searching for Strategy

Companies listed on stock exchanges such as the New York (NYSE) or the London Stock Exchange, have to produce annual reports for shareholders. These contain their future strategies.

- On your mobile phone go online and search for ‘NYSE top companies’ or ‘FTSE top companies’ (*The Financial Times* lists the top 100 companies).
- Then select and search for one of these companies and find the annual report and identify their strategy.
- Is the strategy clear?
- What model or framework are they using?

9.4.1 IDENTIFYING STRATEGIC OPTIONS WITH THE TOWS MATRIX

When creating a strategy it is useful to understand the options available. This should be evidence-based and come from the audit (see Chapter 8, Audit Frameworks). Once the audit has identified the current situation, it is easier to consider the future direction of the organisation.

Professor Heinz Wehrich created a model known as the **TOWS matrix**. You might have noticed that TOWS is ‘SWOT’ spelled back to front. The idea of the TOWS is that it takes the material captured in your audit, plots this into the matrix and extracts your strategic marketing options. Wehrich noted that whilst this may not be new,

the difference with this ‘conceptual framework’ was that it provided ‘a systematic analysis that facilitates matching the external threats and opportunities with the internal weaknesses and strengths of the organization’ (Wehrich, 1982, p. 59) and this is illustrated in Figure 9.1.

	Internal Strengths (S)	Internal Weaknesses (W)
External Opportunities (O)	SO ‘Maxi-Maxi’ Strategy Use strengths to maximise opportunities	WO ‘Mini-Maxi’ Strategy Minimise weaknesses by taking advantage of opportunities
External Threats (T)	ST ‘Maxi-Mini’ Strategy Use strengths to minimise threats	WT ‘Mini-Mini’ Strategy Minimise weaknesses and avoid threats

Figure 9.1 The TOWS matrix

Source: Wehrich, 1982

Let’s explore each of these strategies in more detail.

SO ‘Maxi-Maxi’ strategy

This is a good position to be in and it’s about using the organisation’s strengths to maximise opportunities. It has also been described as the aggressive strategy and often involves expansion and diversification. There is an example of how this is applied in Case Example 9.1.

Case Example 9.1 Airbnb Maxi-Maxi Strategy

In 2008 Airbnb was officially launched as an alternative to hotel rooms. The company encouraged people with spare rooms to rent their space to individual travellers when busy events were taking place and where hotel rooms had sold out. There were some challenges along the way, with many negative stories online, and as a result new policies and greater guidance have since developed, building a strong and recognised brand.

As the business model was successful Airbnb adopted the SO ‘Maxi-Maxi’ strategy, focusing on their brand’s strengths and identifying opportunities to move into new markets.

They realised business users were adopting Airbnb for business travel. There was an opportunity to adapt the individual leisure traveller product to the business market. Executing the Maxi-Maxi strategy required investment and changes to address the needs of the new market:

- Third-party booking tools, because the person making the booking is not always the person travelling
- Self check-ins for late arrivals

- Business-friendly receipts noting all tax details
- One-click expenses so that charges are immediately billed to the company, not the employee
- Focusing on business requirements, including Wi-Fi, laptop-friendly workspaces
- Group trips, so teams could easily identify suitable accommodation
- Promotion on the website

Airbnb's website claimed that over 250,000 companies have now used this facility.

Case Questions

- Can you think of an example where an organisation has expanded to harness its strengths?
- Did this work or were changes needed at a later stage?

WO 'Mini-Maxi' strategy

Where weaknesses have been identified they should be minimised by taking advantage of opportunities. For example, it may be that an organisation has strong presence in a specific market and could expand its product offer but lacks the technology to address this. The WO strategy seeks to resolve this, which may be by acquiring the skills or by company acquisition.

This could be described as a competitive strategy. Wehrich commented that failing to take advantage of opportunities in this area could result in competitors moving into the market.

ST 'Maxi-Mini' strategy

This strategy utilises the organisation's strengths to minimise threats. This is often seen as a conservative strategy.

WT 'Mini-Mini' strategy

The WT strategy aims to minimise weaknesses and avoid threats and has been called a defensive strategy. If this is the only strategy available to the organisation, it is not a great place to be and it may be that a complete review is required to see if it is still viable.

Activity 9.1 Application of the Tows Matrix

1. Using the TOWS matrix look back at a digital marketing audit you have conducted for an organisation of your choice.

(Continued)

(Continued)

2. From this, extract the strengths, weaknesses, opportunities and threats and place into the outer boxes.
3. Make sure all elements are numbered.
4. If you have too many in one area, such as strengths or weaknesses, identify whether there is some duplication and group some items together. This should be a focused list.
5. When the outer boxes have been completed, look first at the SO 'Maxi-Maxi' strategy box and identify which strengths can maximise opportunities. Turn this into a short sentence, numbering the relevant strength and opportunity, so if presented to the organisation, they can see your thought process.
6. Repeat for the remaining three strategy options.
7. If possible, reorganise each box and prioritise which strategic options will be addressed first.

See Template online: Application of the TOWS matrix

9.5 DIGITAL STRATEGY MODELS

Digital strategy models are being led by organisations rather than researchers at present. This section explains three digital strategy frameworks that are shown in Table 9.3

Table 9.3 Digital marketing strategy models

Stage	The social media framework	The acquisition, conversion, retention framework	McKinsey's consumer decision journey
Pre-purchase	Awareness/Consideration	Acquisition	Consideration/Evaluation
Purchase	Conversion	Conversion	Purchase
Post-purchase	Evangelism	Retention	Post-purchase

These digital marketing strategy models all follow a similar three-step route from pre-purchase, to purchase and post-purchase, recognising that this may all happen simultaneously. For example, you may see an app, download it and review it within an hour of purchase.

We also need to more closely consider the notion of *purchase* because consumers are moving away from owning possessions to renting and borrowing, whether it's movies, cars, music or clothing, and in terms of growth strategies, it is a newer disruptive area that has flourished, such as Spotify, with over 50 million subscribers, 30 million songs and available in 60 markets – incredible performance from a company that never actually delivers goods to your doorstep.

If you think about it, many students arrive at their halls of residence with no television and no music collection. Instead, TV is watched on YouTube, using whatever device is available, and music is often streamed via Spotify, iTunes or other apps.

Researchers Fleura Bardhi, Giana Eckhardt and Eric Arnould have termed this move from owning products to renting as ‘a **liquid relationship** to possessions’ (Bardhi et al., 2012, p. 511). This means they have greater mobility, and whilst it is a form of market development – why own when you can rent? – it still scares many traditionalists.

DISCOVER MORE ON LIQUID CONSUMPTION

Read the aptly titled article ‘Liquid consumption’ in the *Journal of Consumer Research* by Fleura Bardhi and Giana Eckhardt (2017).

KEY TERM COLLABORATIVE CONSUMPTION

Some definitions of collaborative consumption include:

- Rachel Botsman, co-author of ‘What’s mine is yours: The rise of collaborative consumption’, has defined the sharing economy as ‘an economic system based on sharing underused assets or services, for free or for a fee, directly from individuals’ (Botsman, 2015).
- Russel Belk, who has written prolifically on the concept of collaborative consumption, suggested ‘Collaborative consumption is people coordinating the acquisition and distribution of a resource for a fee or other compensation’ (Belk, 2014, p. 1597).

DISCOVER MORE ON COLLABORATIVE CONSUMPTION

In an article in the *Journal of Marketing* entitled ‘When is ours better than mine? A framework for understanding and sharing systems’, Cait Poyner Lamberton and Randall L. Rose (2012) provided a useful typology of sharing systems.

Myriam Ertz and colleagues explored motives for sharing in their article ‘Dual roles of consumers: Towards an insight into collaborative consumption motives’ (Ertz et al., 2017).

Plus we also share items. We share cars, sofas, playlists, film accounts, clothes and books! The notion of a sharing economy is not new. We have always borrowed or loaned goods between friends and neighbours.

Today's sharing economy is more sophisticated. Instead of sharing with neighbours, you are sharing with strangers and it is also known as **collaborative consumption** (see Key Term).

Having considered the overall frameworks, this section describes these models in more detail, with examples from organisations.

9.5.1 THE SOCIAL MEDIA STRATEGY FRAMEWORK

When advertising on Twitter or Facebook, both organisations in the advertising-side platform ask organisations to identify their overall focus or strategy based on awareness, consideration and conversion. As this is found in social media, I have called it the *social media strategy framework* and I have adapted it to include *evangelism*, where fans are raving about the product or service on social media. Figure 9.2 shows how this works.

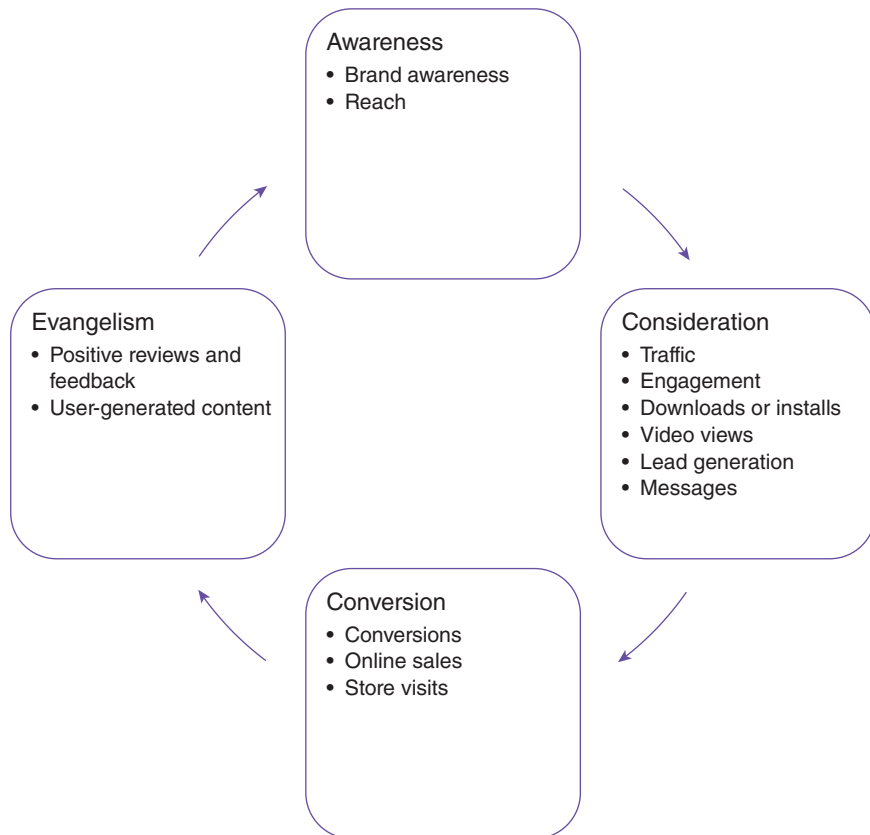


Figure 9.2 The social media strategy framework

Whilst this is valid in theory, it is more likely to occur in a messy fashion with links to and from the different elements.

Awareness

The social media framework includes brand awareness and reach at the start, recognising that in a digital environment, awareness can take place faster than in the offline environment. Using social media advertising, a new service can be targeted at specific customer groups, personas or other demographics, to gain awareness within minutes.

Consideration

Consideration is the stage where visitors are thinking about your brand and this may result in web traffic, talking about the brand online or other engagement, those with apps or software may gain downloads or installations, videos may be watched, leads generated or messages sent to your organisation.

It might also involve finding more information to think about things, before taking a big decision. For example, considering a change of behaviour, such as a move to online registration for government services, or finding out about giving up smoking on health websites.

Conversion

In a digital environment conversion can take place immediately after awareness. You watch an influencer on YouTube talking about a specific product, search and buy in minutes. This is one of the major differences in digital marketing.

It is also possible that once a product or service has been considered (whether that's in minutes or months), you move to conversion, which can mean different concepts for different organisations. For example:

- For an online store, conversion focuses around goods being added to the shopping basket and a checkout being performed.
- Conversion for online registration for government services means an individual, family or business decides to complete the registration documents, or download a pack to help stop smoking or lose weight.
- Downloaded or installed software or apps are used frequently rather than just once.
- This can also mean a visit to a physical store following an online discovery.

Evangelism

Once conversion has occurred, the next stage, which doesn't always happen, is evangelism. The aim is that the customer shares the good news, via positive online reviews or feedback, or better still, other forms of user-generated content, such as unboxing the product, providing a case study or explaining why they chose your organisation.

The challenge is that not everyone shares what they have purchased because:

- It's a secret – a present for a friend and I can't tell anyone until their birthday.
- It's a company secret – I don't want my competitors to find out.
- It's boring – I've signed up for tax updates from a government website.
- It's personal – I've signed up for a slimming programme but I don't want people to know right now.

Digital Tool Google Trends

If you are generating awareness of a new product or service, before the product or service is launched, you might explore the online website Google Trends. This will show the volume of searches for this subject and whether it is popular or not, and may influence your strategy.

- See trends.google.com

9.5.2 THE ACQUISITION, CONVERSION, RETENTION FRAMEWORK

The acquisition, conversion, retention (ACR) framework is displayed as a circular rather than a linear model. Whilst this framework has existed for some time, it is largely credited to the consultancy firm Econsultancy (2009). As with the awareness, consideration, conversion framework, this is another purely digital model considering *online* customer acquisition, conversion and retention, shown in Figure 9.3.

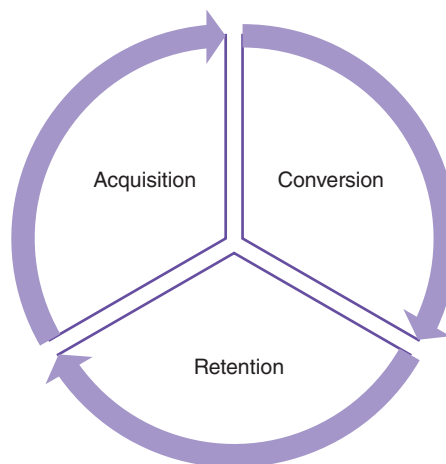


Figure 9.3 The acquisition, conversion, retention framework

Source: Adapted from Econsultancy, 2009

The notion of customers taking an online journey from acquisition to conversion and retention does include a hierarchy of steps. As with the social media framework, acquisition and conversion may take place within minutes. It's a self-explanatory and simplistic model which may be why Econsultancy no longer includes the content on its website. However, as an online-first model, it works well when considering how organisations can better harness digital marketing.

Activity 9.2 Analysis of the Organisation's Acquisition, Conversion, Retention Strategy

Using Template 9.1, analyse the strategy within an organisation of your choice.

Remember, you are not creating objectives, but exploring their overarching plans and it may be that not each element of the framework is employed.

Template 9.1 Analysis of the organisation's acquisition, conversion, retention strategy

Phase	Example of strategy within the organisation
Acquire	
Convert	
Retain	

Ethical Insights Blame the Agency

Coca-Cola launched a Christmas campaign to say thank you to fans in Russia as part of its retention strategy. It created a map of Russia in its brand's red and white colours that was posted on its social media channels.

Maps in Russia are very complicated and perhaps not an obvious Christmas theme. Worse still, this map didn't include Crimea and many social media fans in Russia went online and complained, saying it was incomplete and asking if Coca-Cola was making a political statement.

A second map was subsequently created and re-shared. This one included Crimea along with the long-disputed and little-known Kuril Islands. This time those in Crimea complained and this map was also deleted.

In the meantime, a political firestorm had started. Russians and Ukrainians were calling for boycotts. A series of negative images about the brand appeared online and Coca-Cola headquarters in Atlanta, Georgia, were forced to issue a statement saying sorry. Their response was that their marketing agency made changes to the map without their knowledge or approval. It wasn't us, but the agency!

Online the images still exist; just search for 'coca cola Christmas advert Russia'!

9.5.3 MCKINSEY'S CONSUMER DECISION JOURNEY

Another digital strategy model was created by one of the largest consulting firms in the United States, McKinsey & Company. They conducted interviews with 20,000 consumers within five different sectors and across different geographical areas, including the United States, Germany and Japan, to address how strategy models were changing.

The McKinsey team also proposed another loop model instead of the traditional linear approach, justified by their extensive study: 'consumers are changing the way they research and buy products' (Court et al., 2009, p. 2).

They explained that this newer model, outside the traditional marketing funnel, was why Amazon offered recommendations to customers who were exploring products online and ready to buy. The model, shown in Figure 9.4, was more sophisticated and more complicated than traditional strategy models. That is probably why some marketers prefer to stick to the older, simpler and easier funnel.

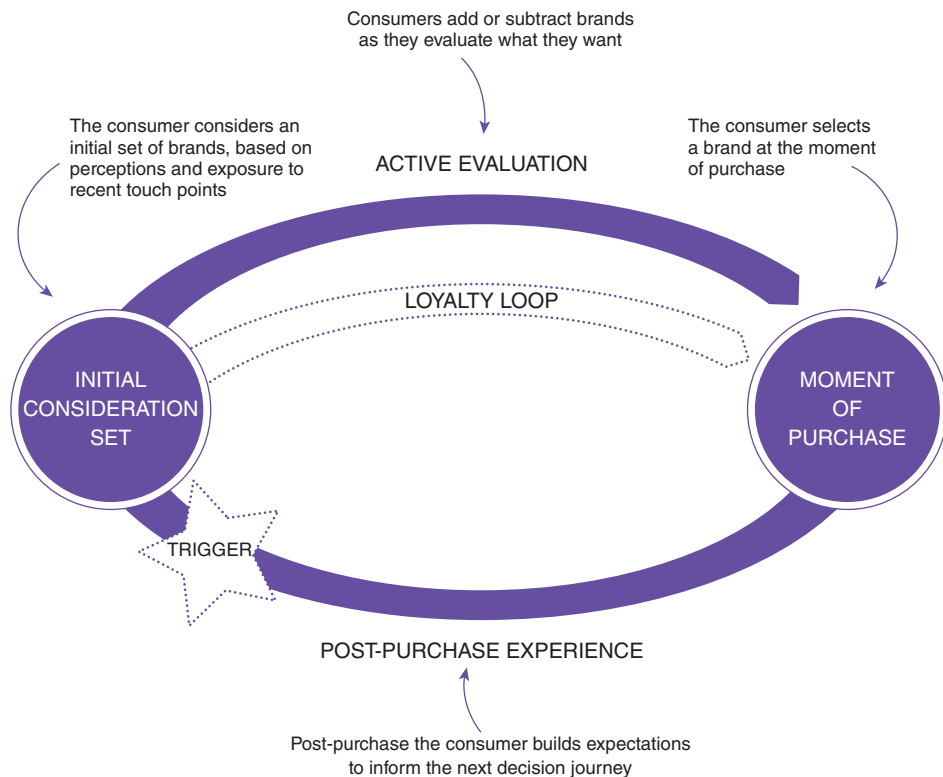


Figure 9.4 The McKinsey consumer decision journey

Source: Exhibit reprinted with permission of McKinsey

Whilst this is technically a map of a consumer journey (see also Chapter 2, The Digital Consumer for more on consumer journeys), it is a digital strategy model because it considers the plan an organisation should make. It is also clearly worked as a strategy model for Amazon, which is recognised as one of the world's leading brands.

The McKinsey consumer decision journey comprises four phases: (a) initial consideration set; (b) active evaluation; (c) moment of purchase; and (d) post-purchase experience. Table 9.4 shows how the consumer decision journey applies to strategy.

Table 9.4 Application of the McKinsey consumer decision journey to strategy

Phase	What this means	How this applies to the strategy
Consideration	If thinking about buying a car or a new beauty product, consumers may have a brand in mind at the start	Gaining stronger brand recognition
Evaluation	Searching for reviews about the brand, consumers start to actively evaluate the original or initial considered item against other similar or different products and other brands. Consumers might also message friends and family in this phase	Building positive online sentiment
Purchase	This is when the sale takes place and the critical factor is that this is no longer the last stage in the sales funnel	Improving the offer and experience for customers
Post-purchase	After the sale, consumers check to see what others have said about the product and they may leave reviews	Encouraging customer evangelism

Part of the McKinsey consumer decision journey can be seen in company strategies, such as Just Eat, shown in Case Example 9.2.

Case Example 9.2 Just Eat

You may already be familiar with Just Eat, which is an app that allows you to find and choose from a whole range of food outlets near your location. What you may not know is that this was created in Denmark and is now available in many countries.

The company described itself as a 'global marketplace for online food delivery, providing customers with an easy and secure way to order and pay for food from our Restaurant Partners' (Just Eat, 2018) and its strategy is based on three aims: (a) improving the consumer experience; (b) bringing greater choice; and (c) driving channel shift.

Just Eat seems to be using an adapted version of the McKinsey consumer decision journey:

- Improving the consumer experience – **moment of purchase** – making it easy to order with one click, embracing technology to order from Amazon Alexa.
- Bringing greater choice – **active evaluation** – so many outlets in the scheme all display the logo, plus an online price promise makes evaluation easier.
- Driving channel shift – **initial consideration set** – ongoing brand investment to ensure the name gains strong recognition online when people are thinking about a take away and use the app not the phone.

(Continued)

(Continued)

Case Questions

- Have you used Just Eat or a similar online food ordering system?
- How did you make the purchase; via phone, app or Alexa?
- After the purchase did the company capture the post-purchase experience via reviews and ratings?
- Was this a one-off purchase or are you a retained customer?

These three digital strategy models more accurately reflect the online purchasing system. Whilst you can use traditional strategy models, do ensure they are adapted and properly reflect the organisation's situation.

Added to this there is the concept of **deliberate and emergent strategy** (see Key Term). You may have a strategy in place, that is the intended or deliberate plan, but something happens and a new strategy emerges that actually works!

As an example, Twitter's original strategy was to provide an SMS service for small groups. Their original marketing material (long disappeared) talked about an online office watercooler, the idea being that when you were getting a glass of water, or making a coffee in the office, you caught up with colleagues and found out what was happening. Twitter as it then was, would facilitate this in an online capacity. However the intended or deliberate strategy was never realised as it soon became a breaking news channel and adopted the emerging strategy instead.

Whilst strategy is an intended plan, it can change due to disruptions in the marketplace that were not predicted or were ignored (see Chapter 1, section 1.4, Digital disruption).

It is essential for marketing professionals to be able to adapt the models and frameworks. One of the challenges is that students often stick rigidly to every single aspect of a model, even when not appropriate. If it's not relevant, remove or adapt the element and explain why!

And if the market changes, don't stick to the same strategy: review and adapt too!

KEY TERM DELIBERATE AND EMERGENT STRATEGY

Deliberate and emergent strategies were originally described by Henry Mintzberg and James Waters (Mintzberg and Waters, 1985, p. 257):

- Deliberate strategies are those 'realized as intended' – it all went to plan.
- Emergent strategies are 'patterns or consistencies realized despite, or in the absence of, intentions'.

The key is to have a strategy – a clear vision for the future which is shared with staff. The strategy may not contain all the detail as it is the overarching focus and more information may be included in the final plan. The key components in a strategy are that it is:

- A short statement
- Based on a strategy model of your choice
- Not timed
- An overview rather than detail
- Usually brave!

9.6 OBJECTIVES

When the strategy has been agreed, the next stage in the digital marketing process is to create objectives, which we will explore in this section.

9.6.1 HIERARCHY OF OBJECTIVES

As we saw in Chapter 8, the digital marketing audit explores ‘where we are now’ and the strategy describes ‘where we are going’. Traditionally strategy was centred around growth in terms of sales or market share, because most commercial organisations were aiming to increase return on investment. Today it tends to be focused on awareness, consideration, conversion, evangelism or retention.

Organisations often have a hierarchy of plans and objectives which are categorised in a pecking order, which can be confusing. A friend working in a new job recently messaged me via LinkedIn with this question: ‘I’m currently in the middle of writing a digital marketing plan. However, I can’t decide whether I should be writing individual objectives for each department or whether the objectives should be for the entire company?’

To answer this question, we can look at earlier research, and Charles Granger writing in *Management Review* (1970) explained that strategic business objectives concerned three key areas: (a) financial; (b) product–market mix; and (c) functional (technical, marketing, operations, personnel), as shown in Figure 9.5. You need to be aware of this, especially when working, as organisations may require marketing objectives that fit with overall policies.

Strategic business objectives are often framed around growth, regardless of organisation type. People often think that government departments and charities don’t or shouldn’t have conversion goals. However, different organisation types can have different goals, whether this is sales, customer awareness or retention.

In Table 9.5, I have illustrated different organisation types and their possible goals. Business goals are the basis for marketing objectives and these revolve around the concepts of awareness, consideration and conversion.

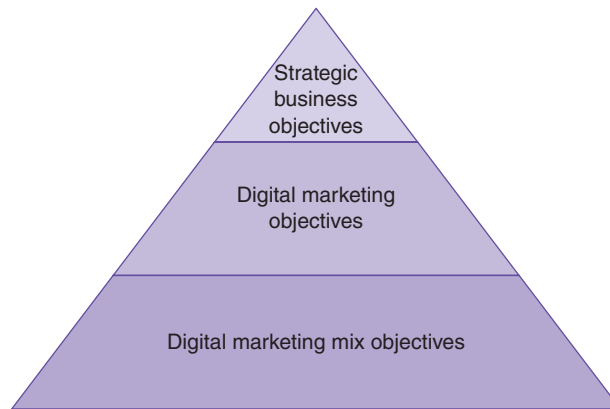


Figure 9.5 Hierarchy of objectives

Table 9.5 Business goals based on organisation type

Organisation type	Examples	Growth goals
Commercial organisations	Business to consumer, business to business companies	Increased awareness
Commercial organisations	Business to consumer, business to business companies	Growth in consideration of a product offer
Commercial organisations	Business to consumer, business to business companies	Increased website conversion
Commercial organisations	Business to consumer, business to business companies	Increased customer retention
Public service organisations, commercial organisations	Government departments, charities, business to consumer, business to business companies	Growth in awareness of an organisation or its product offer
Public service organisations, commercial organisations	Government departments, charities, business to consumer, business to business companies	Growth in conversion for a product or service

Whilst these are examples of goals, they are not objectives as we all know that objectives need to be SMART: Specific, Measurable, Achievable, Realistic and Timed.

Let's explore digital marketing objectives in more detail in the next section.

9.6.2 DIGITAL MARKETING OBJECTIVES IN CONTEXT

A key element of digital marketing is the development of sustainable objectives. Typically, in organisations the objectives often focus on numbers: totals of sales achieved; value of sales; numbers of customers; or volume of products sold.

The challenge for marketing is that focusing on numbers alone limits the focus to quantities and does not create a healthy business as they can fail to provide a sustainable customer offer.

For example, some years ago the cheapest supermarket on the UK high street was called Kwik Save. It focused on very low prices. It was super cheap. But even as a student on a limited budget I wouldn't shop there. It was a terrible in-store experience, more like a battle between customer, packed aisles and unhappy staff. No one wanted to be seen holding their carrier bags! The firm ceased trading and the stores closed. Focused on the lowest possible numbers it failed to attract sufficient customers in a competitive environment.

Smaller organisations also struggle to compete on price. Imagine selling software and then major software corporations decide to give most of it away free. Similarly individual hotels can no longer compete with large formula chains that can drop prices, give big discounts and provide regular offers. The way to compete is based on more than numbers.

This section shows you how to create objectives using tools such as REAN and the 5Ss. Once the objectives have been created, you can build your digital marketing plan, which we will explore in Chapter 11.

9.6.3 CREATING DIGITAL MARKETING OBJECTIVES

Digital marketing objectives focus on customer acquisition, engagement and retention. They should be based on the overall business goals and they should be SMART. If an objective is not SMART it's often a wish – a description of something that someone would like to do, without any real substance.

Based on the goals shown in Table 9.5, we can transform these into SMART digital marketing objectives, as shown in Figure 9.6.

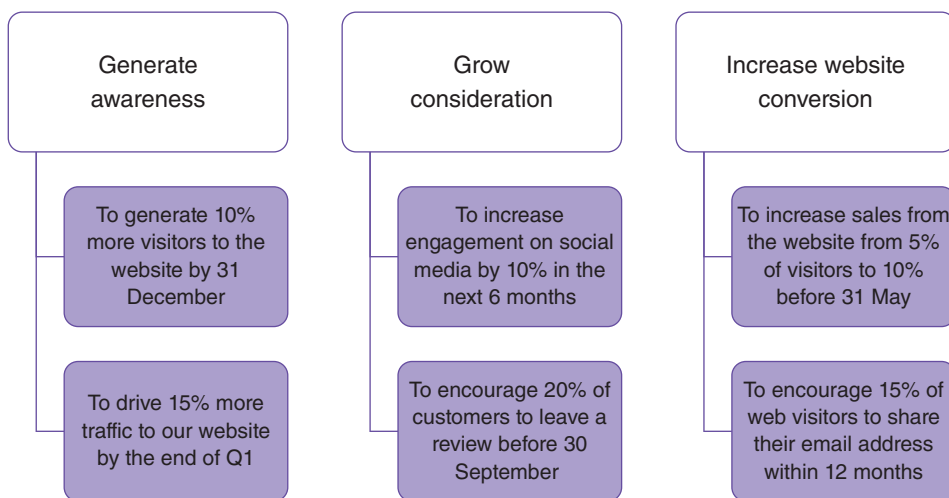


Figure 9.6 Business goals adapted into digital marketing objectives

The examples of digital marketing objectives in Figure 9.6 are part of the strategy to grow the business using the acquisition, conversion and retention (ACR) model.

This section now looks at specific frameworks for creating digital marketing objectives.

Reach, Engage, Activate, Nurture (REAN)

In 2006 two consultants working in Finland at Satama (now Trainers House), Xavier Blanc and Leevi Kokko, developed a model to use with clients which they named Reach, Engage, Activate, Nurture, shortened to REAN (Jackson, 2009).

They had considered older models of marketing communication, such as AIDA (Awareness, Interest, Desire, Action), but there were challenges. Firstly, what is 'interest'? Does it mean a web visitor, someone who has downloaded a document or something else? It was vague and lacked clarity. Then there was desire and how this is measured online. How do you know when desire has been reached?

In a digital world they needed a digital model and so Blanc and Kokko created REAN on the basis that all businesses need to reach potential customers; engagement starts a conversation; activation organises the sale; and finally, nurturing looks after the customer, encouraging them to return. Examples of REAN objectives include:

- Reach: To reach 5,000 new customers before December
- Engage: To engage with 30% of all web visitors in quarter 2
- Activate: To activate sales from 10% of all web visitors over the next 6 months
- Nurture: To nurture 80% of all customers by July

Activity 9.3 Evaluate Objectives Using the REAN Framework

For an organisation of your choice, create and then evaluate your objectives using the REAN framework. Evaluate objectives using the REAN framework

Area	Your objectives	Strengths/weaknesses of the objective
Reach		
Engage		
Activate		
Nurture		

Sell, Serve, Speak, Save, Sizzle – 5Ss

Another tool to create objectives is the alliterative 5Ss model, originally created by Dave Chaffey and P.R. (Paul) Smith in their book *eMarketing Excellence* (Chaffey and Smith, 2008).

Smartphone Sixty Seconds® – Identifying the Objectives

- On your mobile phone go online and find a brand you have visited before.
- Based on their web content, judge what are their top three objectives.
- Share with classmates.

This model was originally intended to be a rubric to assess website effectiveness; it wasn't designed as a tool for developing objectives. As an early adopter of websites, I found this a useful tool, but soon realised this would work well as a structure for developing objectives in organisations and started to use it when creating digital plans and the idea developed.

You may find that when creating objectives it is difficult to find one for each of the elements of the 5Ss, so you may create two objectives in some places.

5S – Sell

This is about the numbers – the volume of sales or 'conversion activities' such as newsletter registrations, downloads and other relevant activities. Sales objectives may also be created within strategic business objectives.

5S – Serve

Customer service objectives ensure organisations strive to improve and develop the service. It is the one area where smaller businesses can win against large businesses, where it can be difficult to consistently deliver fabulous service if you employ thousands of staff.

5S – Speak

Speak is staying in contact with customers and planning communication. Some organisations send you daily emails, some weekly and some every now and then. Speak is also evolving with Live Chat where people can instantly speak to company representatives online.

5S – Save

Organisations are under constant pressure to improve processes and this is where saving time and hassle, for the organisation or the customer, has become an important factor in business management.

The best-known example of saving time is probably Amazon's 1-click ordering system. In September 1997 the United States Patent and Trademark Office (USPTO) issued

Amazon.com with patent reference US 5960411 for the 1-click order system. The objective was to save customers' time when placing an order and remove the hassle of re-entering their name, address, delivery location and payment information.

Amazon.com created a simple ordering process. It generated increased sales for the company, saved customers time, had not been used elsewhere and was easy to use – a classic win-win situation.

Amazon's one click to order was both save and sizzle, which introduces another challenge: some objectives can achieve two elements in one. What you have to remember is to focus on the primary objective.

5S – Sizzle

The toughest objective to develop! A famous marketing slogan from the last century, attributed to Elmer Wheeler, head of the Tested Selling Institute, was 'Don't sell the steak – sell the sizzle' (Wheeler, 1937). This was re-phrased in the UK as 'Sell the sizzle not the sausage'.

Sizzle is the magic, the factor that makes a difference to a product or service, and adding something so different to the product, promotion or other part of the digital marketing mix, that it stands out and customers and competitors alike say 'wow, that's amazing'.

Sizzle needs a bit of thought. It's often not seen within the organisation and can be developed with help from customers. The key is to ask customers, 'if we could wave a magic wand and change one thing, what would it be?'

Examples of digital marketing objectives using the 5Ss include:

- Sell: To increase sales via our Facebook page to 10% in the next quarter
- Serve: To add messaging functionality to Twitter to automatically respond to FAQs, by June
- Speak: To add Live Video Chat to the website within 12 months
- Save: To analyse frequently asked questions and add to Live Chat by December
- Sizzle: Create a how-to video channel to explain our FAQs by the year end

9.7 MARKETING MIX OBJECTIVES

The marketing mix objectives address elements of the 7Ps identified by Booms and Bitner (1980), and known as 'the extended marketing mix'.

The 'traditional marketing mix' is known as the 4Ps and comprised Product, Price, Place and Promotion. I always felt that 'place' was shoe-horned into the model due to the alliteration as it really meant the location or delivery point. Today we think of place as online, in-store or mobile.

The 4Ps marketing mix was designed at a time when businesses sold products rather than services and this concept of the 4Ps is credited to E. Jerome McCarthy who created the alliterative terms (McCarthy, 1964). In 1980 two researchers in tourism, Bernard H. Booms and Mary J. Bitner, claimed that the 4Ps were insufficient

for service businesses (Booms and Bitner, 1980). They stated that the ‘customer is directly involved in and contributes to the assembly process’ (p. 344). Their research investigated the differences between products and services, concluding that the 4Ps model did not fully work in services. They identified three missing variables, which they named Participants, Physical evidence and Processes. Participants later became People and these are the 7Ps of the extended marketing mix.

9.7.1 HOW HAVE THE 7PS CHANGED WITH DIGITAL MARKETING?

Product or service is still the same, although the issue is that services could take longer to become digital as the customer needs to be present – think about hairdressers! In the future we could opt for the augmented reality haircut!

However, we have also seen growth in pure digital products: downloadable books, music and videos. I can create personalised birthday cards online to be signed and delivered direct to the recipient and get an annual reminder which also tells me which cards I’ve sent before. I love the organisational abilities of these digital stores and how they #MakeMyLifeEasy by intelligently using data.

Pricing is changing in a transparent digital world. How many times have you searched for an item online and opened multiple windows conducting three or four searches at the same time, to see which one comes back cheaper? This is why companies in the future will build delivery costs into all transactions.

Place is the fast-changing variable. I can get my order delivered to work, to home, to a parcel collection point, to click and collect, to a locker. I get a text message telling me when my delivery is arriving – sometimes with the name of the driver and their vehicle registration number. Plus I can buy online, via mobile app and a few items on my smartwatch. I can ask Alexa to order books for my Kindle and to add groceries to my shopping list.

Promotion is adapting to new channels such as personalised social media advertising. Although I have many email addresses and receive many emails a day, I still check some shopping emails (see Chapter 3 and Figure 3.3 Why email works model).

People’s roles are changing, as we are witnessing the growth of digital jobs. A quick search online shows hundreds of jobs with titles like: Head of Digital Marketing, Digital Marketing Manager, Digital Specialist, Digital Analyst, Senior Digital Strategist, Digital Marketing Specialist, Digital Marketing Executive, Digital Marketing Assistant and Digital Marketing Intern. More staff have digital responsibilities and are aware of online customer contact.

Physical evidence concerns the online experience, the user experience (UX) or, as it’s now being called, the customer experience (CX). How many clicks do you need to make to fulfil a task, such as download a document, place an order or book a ticket?

Processes are slower to catch up, and thinking that it’s nearly 20 years since Amazon patented its 1-click shopping, many other stores are still behind. This is one of the reasons that Amazon dominates the online shopping environment as it has made the process remarkably easy.

Having discussed the application of the 7Ps extended marketing mix to digital objectives, we can say examples of digital marketing mix objectives might be:

- **Product (or service):** To transform the offline training product into an online version by the end of Q4
- **Price:** To increase online pricing by 5% by year end
- **Place:** To create a store inside Facebook within 12 months
- **Promotion:** To launch online social media advertising campaigns over the next 12 months
- **People:** To empower staff to respond faster on social media by June
- **Physical evidence:** To remove two steps from the user journey by September
- **Processes:** To offer live chat on the website by December

The stronger and clearer the objectives, the easier it is to build a digital marketing plan. It's worth spending time to ensure the digital marketing objectives are easy to understand so that more people will agree to them, especially if you're on a placement!

Finally, don't have too many objectives. If you create a list of 30 or more, the plan will be never-ending and nothing will be achieved.

FURTHER EXERCISES

1. Identify an organisation that is in the news and not performing well. Create an alternative digital marketing strategy for the organisation and justify your response.
2. Create a customer retention strategy for an organisation of your choice.
3. Review the website of an organisation of your choice and assess its digital marketing objectives.

SUMMARY

This chapter has explored:

- How traditional models are applied to digital strategy.
- The usefulness of the TOWS matrix to develop strategic options.
- Newer digital strategy models, including the social media framework and the ACR framework, which are designed for online organisations.
- How the hierarchy of objectives fits into the overall context for digital marketing objectives.

10

BUILDING THE DIGITAL MARKETING PLAN

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** digital marketing planning issues
- Apply** digital planning models
- Analyse** the impact and effort required
- Evaluate** the resources for your plan
- Create** your outline digital marketing plan

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Create a digital marketing plan
- Prepare a social media campaign

10.1 INTRODUCTION

Understanding strategy and the process of creating objectives is the start of creating a plan. This chapter explains how you bring together different elements to build a workable digital marketing plan.

You will discover how to use the one-page digital marketing plan and comprehend the requirements for resources as well as the different budgeting options.

The second part of this chapter looks at social media campaign planning and the details needed to create an online campaign, whilst managing the workload.

10.2 WHY BOTHER WITH PLANNING?

A plan provides a focus, an agreed way ahead and enables organisations to save resources. A lack of planning may impact the organisation in many ways, including:

- Confusion as no one is sure what's happening.
- Working in silos as no information is shared and there's a lack of integration (Roberts, 2011).
- Lack of skills as no one may be available internally to carry out the work and the organisation may need to spend more on consultants or agency staff.
- Difficult to measure effectiveness as if no plans are in place, no one will be clear if the goals have been achieved.
- In a complex and changing external environment the wrong decisions may be taken based on lack of information.
- Short-term decisions are taken based on immediate rather than long-term requirements and could be wrong.
- Greater investment is often required as carrying out actions at the last minute may require larger budgets as goods and services may be more expensive.

Having identified issues with a lack of a plan, this still happens. Making a plan prepares organisations and people for things that might happen, rather than ignoring the situation and assuming it will all be OK.

This happens in digital marketing too; YouTube, for example, ignored calls to remove terrorist videos until major advertisers stopped using the channel for adverts. They are not alone, and all the tech giants had to create a collective plan to identify offensive material and remove it before it is shared publicly.

Having a plan ensures you are prepared for what might happen as well as agreeing the organisation's future direction. Let's explore how to build a plan.

10.3 BUILDING THE PLAN

With an understanding about the challenges due to a lack of planning, it's time to identify tactics to achieve the strategy and objectives.

Within the sequence of the digital marketing process, after the audit, strategy and creation of objectives, the next step is building the digital marketing plan.

The plan should be based on (a) your strategy, (b) your objectives and (c) the personas. Effectively the plan details the steps required to achieve the objectives, so if you haven't finished your objectives, you can't create the plan!

There are different ways to create a digital marketing plan, which largely depend on the organisation or the brief you have been given. In this section we will look at two approaches:

- Digital application of the 7Ps
- One-page digital marketing plan

You may wonder which approach to use. It's fine to use either (unless there is a specific request). You may find that the digital application of the 7Ps is often more useful where an organisation has not fully embraced digital marketing, whereas the one-page digital marketing plan outline is useful where an organisation has already adopted digital tactics and is keen to improve.

A digital marketing plan, regardless of which approach is adopted, follows these steps:

- Step 1: Create a strategy and objectives
- Step 2: Build personas
- Step 3: Place objectives into a table, add outline tactics for each
- Step 4: Extract all tactical actions and add detail
- Step 5: Add resources and budget

And as you will notice, the plan won't work unless you have already developed the strategy, objectives and personas.

This is an iterative approach that starts by adding earlier work (strategy, objectives, personas) and then considers potential tactics. Once agreed, detailed tactics are added and skills required identified. You can then evaluate the resources and the budget.

10.3.1 DIGITAL APPLICATION OF THE 7PS

The 7Ps, also known as the extended marketing mix (Booms and Bitner, 1980), has been used as a planning model as its focus can be tactical as well as strategic.

Let's apply the model to the digital environment and explore examples of where digital tactics can be applied:

- Product: Adapt or enhance existing products to a digital offer. For example, an online bookshop's website offers downloadable or preview material.
- Price: Pricing online is transparent so you should incorporate delivery, rather than adding as an extra cost.

- **Place:** Enable buying via website, social media and mobile. More retail stores offer all forms of purchase (online, in-store, mobile).
- **Promotion:** Social media advertising brings new promotion methods, as do harnessing social media networks to share product news. For example, GAP clothing moved to mainly online ads to better target the right audience.
- **Processes:** Online this refers to the user experience; how many clicks to complete the purchase? Many websites have reviewed the customer journey to ensure a speedy process and enable login via Facebook or Twitter.
- **Physical evidence:** Does the user trust the website, does it look authentic? Google is seeking greater authentication from websites with a Secure Sockets Layer (SSL) to protect your data; without this, when browsing you may see the message 'this website may not be secure'.
- **People:** How does customer service work online? Is live chat available? Many online retailers now offer live chat and messaging.

Many organisations have adapted to a digital version of the 7Ps, as Case Example 10.1 shows, with two fashion retailers. What is interesting is that their tactics are remarkably similar.

Case Example 10.1 Digital Application of the 7Ps to ASOS and Boohoo

Online fashion companies ASOS and Boohoo offer similar products aimed at similar demographics. ASOS targets 20-somethings and Boohoo targets 16–24-year-olds (ASOS, 2017; Boohoo, 2017).

Table 10.1 shows how they have digitised the 7Ps.

Table 10.1 Digital application of the 7Ps to ASOS and Boohoo

7Ps	ASOS	Boohoo
Product	<ul style="list-style-type: none"> • Products grouped into demographics (men, women) and products, brands and edits • Also offers 'Marketplace', enabling boutiques to sell direct 	<ul style="list-style-type: none"> • Products grouped into demographics (men, women) and themes (campaigns, trends, get the look)
Price	<ul style="list-style-type: none"> • Premier Delivery UK for unlimited next-day or nominated-day delivery for 12 months – pay £9.95 	<ul style="list-style-type: none"> • Boohoo premier – pay £9.99 for free next day delivery for 12 months • Student discounts offered
Place	<ul style="list-style-type: none"> • Orders via website and app • Free delivery with orders over £20 • Click and collect • Evening delivery • Precise time delivery 	<ul style="list-style-type: none"> • Orders via website and app • Collect from lockers • Evening delivery • Weekend delivery
Promotion	<ul style="list-style-type: none"> • Places ads across social media • Uses Instagram to promote new products 	<ul style="list-style-type: none"> • Places ads across social media • Uses Instagram to promote new products • Offer codes available online

7Ps	ASOS	Boohoo
Processes	<ul style="list-style-type: none"> Encourages account registration to remember details 	<ul style="list-style-type: none"> Encourages account registration to remember details
Physical Evidence	<ul style="list-style-type: none"> Easy to use site with frequently changed home page 	<ul style="list-style-type: none"> Easy to use site with frequently changed home page
People	<ul style="list-style-type: none"> Online customer care Live chat 	<ul style="list-style-type: none"> Customer support via Twitter

Case Questions

- Looking back at how ASOS and Boohoo apply the 7Ps, how else could they develop their tactics to create a greater difference between each other?
- Do you recognise tactics employed by other organisations?
- What do you recommend they should do differently and why?

10.3.2 ONE-PAGE DIGITAL MARKETING PLAN

In Chapter 9 we looked at strategy and objectives, and considered how a strategy translates into objectives. This was shown as an example in Figure 9.5, and if we adapt that diagram and list some possible digital marketing tools to use, we can start to create that plan.

Table 10.2 shows the strategy, digital marketing objectives and tactics that have already been created. There are two objectives for each strategy and each objective has one or more suggested tactics.

Table 10.2 Strategy, digital marketing objectives and tactics

Strategy	Generate awareness	Grow consideration	Increase website conversion
Objective #1	To generate 10% more visitors to the website by 31 December	To increase engagement on social media by 10% in the next 6 months	To increase sales from the website from 5% of visitors to 10% before 31 May
Tactics #1	<ul style="list-style-type: none"> SEO Online PR 	<ul style="list-style-type: none"> Social media 	<ul style="list-style-type: none"> Improve UX
Objective #2	To drive 15% more traffic to our website by the end of Q1	To encourage 20% of customers to leave a review before 30 September	To encourage 15% of web visitors to share their email address within 12 months
Tactics #2	<ul style="list-style-type: none"> Advertising to drive traffic SEO Blog 	<ul style="list-style-type: none"> Email marketing 	<ul style="list-style-type: none"> Site design

The strategy is based around the **social media framework** (see Chapter 9) and the objectives are aligned with this.

Under each objective I have added one or more possible tactics, which we can now expand into a plan. Before we do, we need to consider that there are three fundamental stages in the user or customer journey: pre-purchase, purchase and post-purchase. These are described in the strategy as awareness, consideration and conversion, so they are arranged in a logical order.

Another key factor is that we are targeting specific individuals or audience personas (see Chapter 4) rather than everyone who may visit our website, social media space or affiliate site.

This is because it's fine to consider social media to increase engagement, but if our persona doesn't use social media, it won't work. So now you need to revisit the one, two or three personas you created earlier (see Activity 4.1: Construct a digital persona, p. 104) and ensure these are still valid and resonate with the organisation's strategy and objectives. If not, you may need to adapt.

Having confirmed the personas, look back at your strategy and the desired objectives. Ensure that you select elements from the digital toolbox which are relevant to the objectives. To help with this, note which objective is being achieved for each tactic. In some cases it may be more than one objective.

Table 10.3 shows an example of a one-page digital marketing plan outline. This addresses the tactics only and does not address the resources required, nor the control mechanisms and the measures. This provides a balanced overview to decide which tactics should be selected and from this, the specific details concerning resources can be added in the next phase.

With Table 10.3 we need to apply the plan to an organisation, so let's imagine this is a charity requiring volunteers, supporters and donors. I have added in three personas, which we could outline as:

- Vic the volunteer – older, male, uses Facebook to stay in touch with grandchildren only, checks email every day, visits the website, reads online articles
- Sam the supporter – student, rarely checks email, uses Instagram and only online on mobile
- Diana the donor – business owner, donates money, has no spare time, uses LinkedIn and Twitter, checks email, reads articles online

Your personas should contain significantly more detail and be evidence-based!

Table 10.3 One-page digital marketing plan

Strategy: Pre-purchase, purchase and post-purchase				
Digital toolbox element	Objective being achieved	Persona 1	Persona 2	Persona 3
		Vic the volunteer	Sam the supporter	Diana the donor
Email	To encourage 20% of customers to leave a review before 30 September	Email and ask for a review on how volunteering makes a difference		

Strategy: Pre-purchase, purchase and post-purchase

Website	To increase sales from the website from 5% of visitors to 10% before 31 May	Add case studies to the website to show the good work		
Online PR	To generate 10% more visitors to the website by 31 December	Create a case study on how volunteering makes a difference		Find companies for PR on benefits for getting involved with charities
Search engine marketing	To drive 15% more traffic to our website by the end of Q1	Do not use PPC for these personas		
Blogs	To drive 15% more traffic to our website by the end of Q1			Articles on benefits for companies to get involved in LinkedIn
Social networks	To increase engagement on social media by 10% in the next 6 months	Posts about volunteers making a difference and organising a volunteer event	Links to images from resources area with toolkits on organising events	Case studies on how volunteering makes a difference on LinkedIn
Social media advertising	To drive 15% more traffic to our website by the end of Q1		Ads on Instagram to download useful content from website	Urgent appeal ads on Twitter
UX	To increase sales from the website from 5% of visitors to 10% before 31 May		Improve the mobile UX	
Site design	To encourage 15% of web visitors to share their email address within 12 months	Add resources area with downloadable toolkits on organising events		

The essential aspect to this one-page digital marketing plan outline is that where there are blank boxes, this is because the tactics (email, online advertising or pay per click) are not relevant for those persona groups.

Activity 10.1 Create Your Outline Digital Marketing Plan

Using the framework from Table 10.3 and the Template online, create an outline digital marketing plan. Remember that not all elements of the digital toolbox need to be completed, but you need to have developed relevant evidence-based personas!

See Template online: [One-page digital marketing plan outline](#)

Table 10.3 contained a list of actions and based on this I can construct the plan. I have had to extract each action and granulate the details, as shown in Table 10.4. This example is based on just two of the actions identified, which started as:

- Email and ask for a review on how volunteering makes a difference
- Add resources area with downloadable toolkits on organising events

The first of these, emailing, involves a whole series of actions and leads into development of the case studies which is a second tactic.

Table 10.4 Building the action plan

Area	Action	When	Note	Skills
Email	Segment database into volunteers (V1 group), supporters (S1 group) and donors (D1 group)	By 28 February	Ensure we have consent to contact!	Database management
Email	Email volunteers and ask for a review on how volunteering makes a difference	15th of every month	Once they've added, move into new V2 group, so we don't continue to ask and irritate	Database management, mailing management systems
Case study	Find volunteers willing to be case studies, initially ask around in the office	By 31 March	Try to get a balance of people, so there is some variation in the case studies in terms of demographics and activities	Communication
Case study	Invite case study volunteers into the office and interview	By 30 April	Aim is to get 10–14 case studies	Communication, listening, writing
Case study	Organise photographer to get some images of case study volunteers	By 30 April	Get approval from volunteers of photos and consider getting one image framed and sending as a thank-you to each volunteer	Photography
Case study	Video interview and edit	By 30 April	Get sign-off for video at start	Video
Case study	Get approval/sign-off from volunteers for case studies	By 15 May	Ensure written permission obtained to use online and offline for up to 3 years	Admin
Case study	Edit as needed and publish to website (written case study, video, images and quotes)	By 31 May	Note to remove in 3 years	Social media
Case study	Share case study #1 on social media	By 30 June	Add to content calendar and schedule	Social media
Case study	Build into 12 themes for one a month	By 30 June	Balance themes with the activities	Social media Planning Management
Case study	Posts about volunteers making a difference and organising a volunteer event	By 30 June	Advise volunteers 3 days before that they will feature and ask them to share!	Social media
Events	Run workshop to identify (a) all key events and (b) how to run successful events, (c) what to avoid and (d) what the charity could provide that would be useful	By 31 August	Hold at lunchtime and invite volunteers	Management

Area	Action	When	Note	Skills
Events	Write up notes and extract common themes. Turn into checklists	By 30 September	Try to link the themes to the organisation's overall plan	Management, admin
Events	Graphically improve the checklists into attractive documents to easily download and print	By 31 October	As some will print the docs, make sure they are not blocked with colour that uses all printer ink!	Graphics
Events	Add checklists to resources area on website	By 30 November	Explore if these can be shared in other online places	Web access

Table 10.4 shows the overall area, the specific action, the date by when this should happen, any relevant background or other notes, as well as the skills needed. It may be that the digital marketing assistant can use video editing or a good photographer. This is why the job roles are not yet added as it is about skills, not roles. Plus there are no costs added at this stage. People and finances are added when we consider resources.

10.4 RESOURCE PLANNING – THE 9MS

After you have listed the tactics and created your plan you need to consider what resources will be required to ensure it happens.

The foundations of resource planning are in manufacturing, where it was critical to ensure the right people were in the right place with the right machines and materials, at the right time. This has led to a plethora of 'M models', from the 5Ms of Efficiency (Manpower, Materials, Machines, Methods, Money) to the Six Sigma techniques for improving processes (Method, Mother nature, Man, Measurement, Machines, Materials).

I have adopted a blended approach, with 9Ms: Manpower, Money, Method, Mother nature, Measurement, Machines, Materials, Management and Minutes, as shown in Figure 10.1.

Digital Tool Online Freelance Marketplaces

There are many online freelance marketplaces where companies (buyers) request a service, from writing a blog article to creating an infographic, or editing photos to developing social media profiles.

Individuals (sellers) can either bid for the work or create 'all in one packages' showcasing what they could do for a fixed fee. Some of these marketplaces include:

- peopleperhour.com
- upwork.com
- freelancer.com
- fiverr.com

Many students register with these sites to supplement their incomes whilst studying!

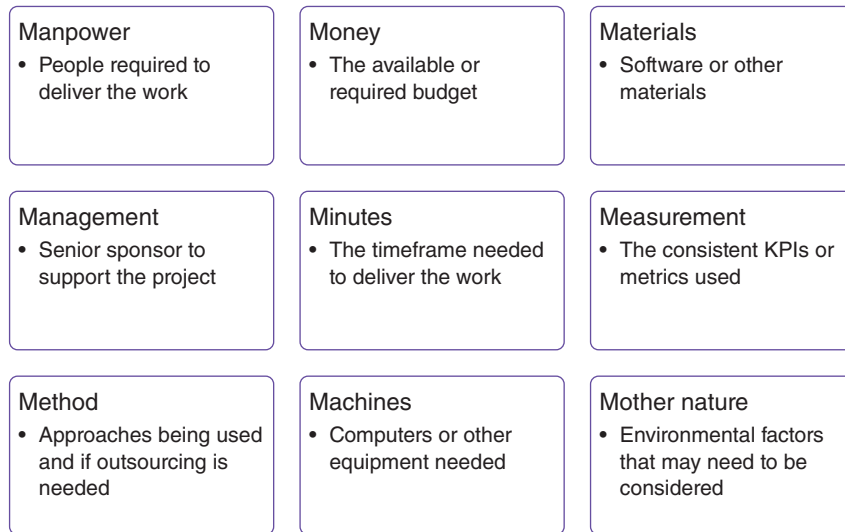


Figure 10.1 The 9Ms of resource planning

Depending on the company size you may not need all of the 9Ms, although it is always sensible to utilise the first six as people are always required to deliver the work, a budget is often needed and it is likely that in a digital marketing environment some software or other materials such as written content, images or videos may be needed.

Regardless of company size it is essential to obtain a senior sponsor at a management level to support the project, or the lack of support could lead to a project not starting, being postponed or, worse still, failing. Timeframes help to explain the total time required to deliver a piece of work and this can highlight if it would take too long or if extra help may be needed.

Measurement is covered further in Chapter 13, Digital Marketing Metrics, Analytics and Reporting, and the key at this stage is to ensure those involved in the project have agreed consistent Key Performance Indicators (KPIs) or metrics.

A project will fail if you are measuring likes gained for a Facebook page and if I am measuring sales income via Facebook. We are measuring different numbers and they will never tally, so ensure that there is consistency from the start.

The final 3Ms, method, machines and mother nature, often occur in larger organisations.

Method is becoming more important as organisations use freelancers or online services to deliver certain aspects of a project (see Digital Tool: Online freelance marketplaces). When scoping a marketing plan, consider whether there are internal skills and, if not, what additional help is required (see Ethical Insights: Human beings not algorithms).

Using online freelancers often means you can speed up processes to facilitate faster delivery of some parts of a project. In larger organisations it can be easier to gain permission to spend £1,000 or \$1,000 on a service, than it can be to start a temporary staff-hiring process.

Ethical Insights Human Beings Not Algorithms

There is a downside to online freelance marketplaces as their reward systems are neither managed nor controlled.

One example is Amazon's Mechanical Turk (named after an 18th-century chess-playing machine, 'The Turk') which recruits workers to complete tasks from requesters. The tasks require human intelligence, which means they cannot be done in any other way. Typical projects require people to categorise items, select correct spellings and find item numbers. The dark side is that the fee for the work often starts at less than one US cent per item. So if you need to categorise the Twitter comments from one hundred or one thousand tweets, you could earn 10 cents or even one dollar!

A campaign against low pay and poor treatment on Amazon Turk was started, named *human beings not algorithms*, where Kristy Milland, a 'turker' (as workers call themselves), contacted Jeff Bezos to explain that she had completed more than 830,000 tasks on Mechanical Turk, earning an average of 20 cents for each and was unhappy with the treatment received (Milland, 2015).

But Amazon's Mechanical Turk is still alive and well – and used frequently by researchers!
See mturk.com

In a digital environment machines are coming to the fore. When the M models were developed in manufacturing, machinery concerned the tools need to deliver the work. Applied in a digital environment, this might include desktop or laptop computers, tablets or additional mobile phones to monitor social media channels out of hours. Planning for these resources in advance is a good idea as, again, gaining budgetary approval in bigger organisations can take weeks (or months).

Mother nature is a well-considered factor in manufacturing. You may be planning to develop a new software project in, say, San Francisco, where Facebook and Twitter have their headquarters buildings, yet it is also well known for major power failures.

Activity 10.2 Assess the Resources for Your Plan

Using the 9Ms of resource planning as shown in Figure 10.1 as a framework, start to assess the requirements for your plan. You need to evaluate factors such as:

1. Are extra people needed to deliver the work? Could existing staff be trained? Could the work be outsourced?
2. What is the overall budget available?

(Continued)

(Continued)

3. Consider materials, especially for digital marketing (see Chapter 4, Content Marketing) as you might need copywriting, video production and more.
4. Identify the project sponsor in management and the timescale, which may be 3, 6, 9 or 12 months.
5. What are the agreed measurements?
6. Is method a factor or can all work be delivered in-house?
7. Are additional machines needed (e.g. do the design team need new Macs?) and is mother nature a factor or not?
8. Add a summary line for each and build a larger commentary to explain and justify your decisions.

See Template online: Resources for your plan

Smartphone Sixty Seconds® – Searching for the Downside

1. Use your mobile phone and search for terms like those shown here and see what stories you can discover:
 - Downside of Mechanical Turk
 - Don't use Mechanical Turk
 - Mechanical Turk problems
2. Are the stories recent, up-to-date or from a few years ago?
3. Does Amazon's Mechanical Turk respond?
4. If you were working there, how would you manage negative stories about your business online?

10.5 BUDGETING

Once the tactics and resources are all listed you might need to prepare a budget. If you are working on a placement this may be for the senior management team, or if you are on a community project, your colleagues may need to be involved.

10.5.1. SPECIFIC BUDGET SETTINGS

Traditionally budgets were organised based on specific settings, such as:

- Budget needed to meet objectives

- Budget available
- Percentage of turnover
- Last year's budget.

Budget needed to meet objectives

When the objectives have been formulated and the tactics listed, you allocate the required funds to complete all activities. This method is also known as the 'objective and task' budget.

Budget available

More often than not this applies to smaller organisations and is about the possible available budget. Over the years I have received emails from students working on placement who are on very small budgets. This means you need to become more creative!

Percentage of turnover

Typically used in services businesses, the percentage of turnover ranges from 2% to 20% but very much depends on the business. Financial institutions often work on 10% of turnover.

Last year's budget

This method is more usual in larger organisations where a budget has been allocated to different departments and you are given last year's budget plus 5%. The downside with this method is that departments are encouraged to spend the entire budget, even if not needed, just to gain the same amount the following year.

10.5.2 DIGITAL MARKETING BUDGETS

In digital marketing there is greater flexibility as online advertising is auction-based and so depends on the search terms being used, the volume of searches and competition for the words. As an example, if you bid for a phrase like 'online postcard

KEY TERM COST PER ACQUISITION

In a digital environment we consider cost per acquisition – what does it cost to acquire a new customer? Acquisition can be acquiring data (email address), a donation or a sale.

As an example, if my average sale is £100 on a product that costs £25 to produce, my profit margin is 75%. If my target profit margin is 50–70% I could afford to spend £5 to £50 in acquiring the customer.

However, if it is an expensive keyword that costs £100, I would never make a profit and this wouldn't work. I therefore need to understand and factor in the acquisition cost from the start.

printing' this may cost £10 per click. But if you bid for 'e postcard maker' this may cost 10p. This means smaller businesses can more easily compete, as long as they are creative. Newer budgeting models have been introduced, such as **cost per acquisition**.

10.6 ASSEMBLING THE PLAN

Having identified the actions, evaluated the resources and agreed the budget, you are now ready to assemble the final plan.

10.6.1 SOCIAL MEDIA CAMPAIGN PLANNING

When building your digital marketing plan you will have considered promotion (see Chapter 3, The Digital Marketing Toolbox) and you may need to create individual campaign plans. This section looks at social media campaigns; if you want to organise other campaigns see Discover More on Advertising and Promotion.

DISCOVER MORE ON ADVERTISING AND PROMOTION

For in-depth coverage of online campaigns, read the latest edition of *Advertising and Promotion* by Chris Hackley and Rungpaka Amy Hackley (4th edn, 2017).

To create social media campaigns you will need to adopt a campaign planning process, and a blueprint for this is shown in Figure 10.2.

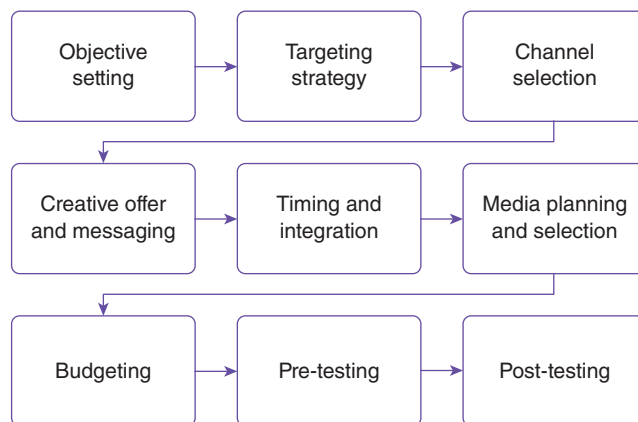


Figure 10.2 Social media campaign planning process

Objective setting

Whilst you will have agreed objectives for the digital marketing plan, you will also have campaign objectives. Think of campaign objectives as a subset of your main objectives, one at a time, as shown in Figure 10.3.

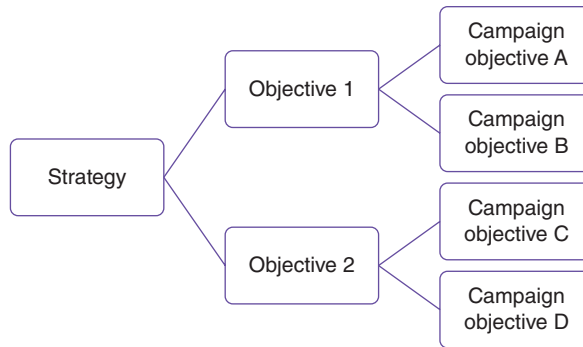


Figure 10.3 Framework for digital marketing campaign objectives

Let's apply the framework where the strategy is the social media framework, focused on conversion. The segment is students living away from home in the UK aged 18–22 with no cooking skills, moderately health conscious, mobile and laptop device users for at least 5 hours a day

Objective 1: To gain a 10% increase in online sales in November

- **Campaign objective A:** To target UK students aged 18–22, living away from home, via Facebook, in November, offering evening delivery
- **Campaign objective B:** To re-target web visitors using Instagram, during October and November, with a 10% student discount offer

Objective 2: To increase adoption of the mobile app by 25% from September to December

- **Campaign objective C:** To target UK students aged 18–22, living away from home, via Facebook, in November, offering free app with calorie counter
- **Campaign objective D:** To re-target web visitors across the Google network, from September to December, with the app details

The granulation or development of the details in the specific campaign objectives makes it easier to construct the **creative offer and messaging**, which follows later in this chapter.

The difference between the digital marketing plan objectives and the campaign objectives is the detail. Campaign objectives focus on a platform and a specific activity – such as re-targeting.

Targeting strategy

Once the objectives have been set, you will check that the targeting strategy, which is identified in the main digital marketing plan, is consistent. What you should not do at this stage is to introduce a new target audience.

Ideally you look back at your personas and integrate this at the campaign level too. For example, if your target audience is fashion conscious 16–24-year olds, the campaign targeting strategy should select specific age groups or genders in this target audience. You might not select everyone as one group and may decide to target a narrower audience, such as girls aged 16–18 years.

It is also possible that you may re-target those who have already visited your website to encourage them to move from consideration to conversion.

Channel selection

With many social media networks available, channel selection can be a challenge! The key is focusing on the social media networks used by the target audience or personas. This is another reason why, when developing personas, you consider the webographics (see Chapter 4, Content Marketing). If the webographics are not strong or detailed enough, you need to go back and add greater depth and information.

Thinking about potential channels for the target examples in this section:

- Students living away from home might use Facebook to stay in touch with parents
- Fashion-conscious 16–24-year-olds might use Instagram to see the latest edits

The critical factor is ensuring you have research to back up and support your claims.

Creative offer and messaging

The objectives and targeting have been agreed and the next stage is building the creative offer. However, the creative offer can be more challenging in a digital environment. Think about the size of an ad on Facebook – it's tiny! So somehow you need to communicate a specific message that appeals to the target audience in microseconds. That's a lot of work.

KEY TERM ADVERTISING APPEALS

The idea of an advertising appeal is explained well by Pragya Keshari and Sangeeta Jain, writing in the *Journal of Marketing & Communication*:

Advertising appeal refers to the approach used to attract the attention of consumers and/or to influence their feelings toward the product, service, or cause. These appeals are normally categorized as emotional and rational, and are used interchangeably as mood/logical or transformational/informational in different contexts. (Keshari and Jain, 2014, p. 37)

Advertising appeals (see Key Term) are either emotional, trying to elicit an emotion, whether positive or negative, or rational, trying to connect with a practical or utilitarian need, and are the foundation for the advertising message (Grigaliunaite and Pileliene, 2016).

Many consumer behaviour experts have explored examples of rational (effectiveness, convenience, price, safety) and emotional (exclusivity, adventure, beauty, relaxation) appeals (see Discover More on Consumer Behaviour). The key is that a single appeal is used in an advert, aimed at a specific target audience, so that there is instant understanding and no confusion.

DISCOVER MORE ON CONSUMER BEHAVIOUR

Two books on consumer behaviour provide much more detail on appeals and consequences:

- *Consumer Behaviour: Applications in Marketing*, by Robert East, Jaywant Singh, Malcolm Wright and Marc Vanhuele (2016).
- *Consumer Behaviour*, 3rd edition by Zubin Sethna and Jim Blythe (2016).

Smartphone Sixty Seconds® – Finding Appeals

- Use your mobile phone and log in to a social network. What adverts can you see?
- Take one advert and identify the advertising appeal. Is it emotional or rational?
- Compare with classmates: do they see the same or different messages?

Activity 10.3 Propose the Creative Offer and Messaging

Propose the creative offer and messaging for either:

- Campaign objective A: To target UK students aged 18–22, living away from home, via Facebook, in November, offering evening delivery; or
- A campaign related to an organisation of your choice.

See Template online: Creative offer and messaging

Earlier in the chapter I gave examples of campaign objectives and one of these was:

- **Campaign objective A:** To target UK students aged 18–22, living away from home, via Facebook, in November, offering evening delivery.

The nominated channel in this example is Facebook and it is a small advert. I have limited space in terms of headlines and copy to create my offer.

Timing and integration

Social media and PPC adverts allow you to plan the exact timing of when you want to launch the adverts. For example, Facebook allows you to schedule adverts (if the ‘lifetime budget’ option is selected) for specific days at specific times. This means you can run adverts that are integrated with an overall message. For example, if your campaign objective is to target UK students aged 18–22, living away from home, via Facebook, in November, offering evening delivery, you may run the adverts between 4pm and 9pm, when the target audience is thinking about food!

Timing is one aspect and the important factor is to ensure that the whole campaign is integrated or joined up with other marketing promotional activities.

If a campaign lacks integration, the customer will become confused. Imagine looking at a photo on Instagram, clicking through to the website, but landing on a page that doesn’t make sense – this is **cognitive dissonance** (see Key Term) and usually results in customers abandoning pages.

Another aspect of timing is ensuring that you don’t run different promotions at the same time. If you plan a 10% off and a 15% off campaign simultaneously, the 10% is less likely to work and the advertising budget will be wasted.

KEY TERM COGNITIVE DISSONANCE

Leon Festinger, a social psychologist, developed cognitive dissonance theory (Festinger and Carlsmith, 1959), which explained that individuals could have conflicting attitudes, beliefs or behaviour, leading to discomfort.

Inconsistency in beliefs leads to dissonance or discomfort – for example, you may believe that smoking is dangerous but you are at a party and meet someone interesting, who is smoking, and instead of complaining about the smoke, you stand next to them, potentially inhaling. Your belief that smoking is bad is inconsistent with your action (putting up with the smoke) and results in a change of belief or behaviour.

Festinger described this as ‘opinion change following forced compliance’ (Festinger and Carlsmith, 1959, p. 203).

Media planning and selection

Having agreed four campaign objectives, as in the worked example in Figure 10.3, we can apply these to the overall media plan.

To enhance the adverts we need to ensure that the website is up to date and contains relevant information and we may also write some new blog articles that focus on the challenges of being a student and cooking when away from home.

Table 10.5 shows a digital media plan example that explains the type of content that will be placed and where. This would typically be supported with a commentary to provide more details.

Table 10.5 Digital media plan example

Communication channel	General information	Helpful recipes	News about food	Ad campaign
Website	✓	✓	✓	
Blog	✓	✓	✓	
Twitter	✓	✓	✓	
Facebook		✓	✓	✓
Instagram		✓	✓	✓
Google adverts				✓

Budgeting

In section 10.5 we considered different budgeting options and in Chapter 3, The Digital Marketing Toolbox, I explained the different search engine advertising payment options. You might experiment with a small budget initially and monitor the results. As you gain the evidence, results and confidence, you can increase the budget.

Pre-testing

Before running the ads you might test different variables to see what works. These may include:

- Images – which images are preferred by the audience?
- Headlines – which headlines provide greater advertising appeals?
- Body copy – which content provides greater advertising appeals?
- Landing page – when the target audience clicks on the link and is directed to your website or a specific page, are there some pages that work more successfully than others?

Ideally test one variable at a time to gain a better understanding of what works. In many social media platforms you can run several different adverts at the same time and gain feedback as to what worked.

Testing in a social media environment is fairly straightforward. Set a small budget, run the adverts for a week and gather the feedback. This is also known as a ‘test and learn’ strategy.

Post-testing

Sometimes referred to as tracking, post-testing is measuring results after the adverts have run. In digital advertising this can take place quickly, literally in 24 hours. This will provide data on which were the most successful ads and why. You can repeat the ad format to re-test in case this was an exception!

10.7 MANAGING THE WORKLOAD

Once the tactics and resources are all listed and the budget has been submitted, you might need to reduce the costs or re-allocate priorities. One framework for assigning elements such as manpower, money, methods, machines, materials and minutes is the impact and effort matrix (Gray, 2010), which is shown in Figure 10.4. The matrix is ideally completed in a small team and creator Dave Gray suggests that this takes 30 minutes to one hour.

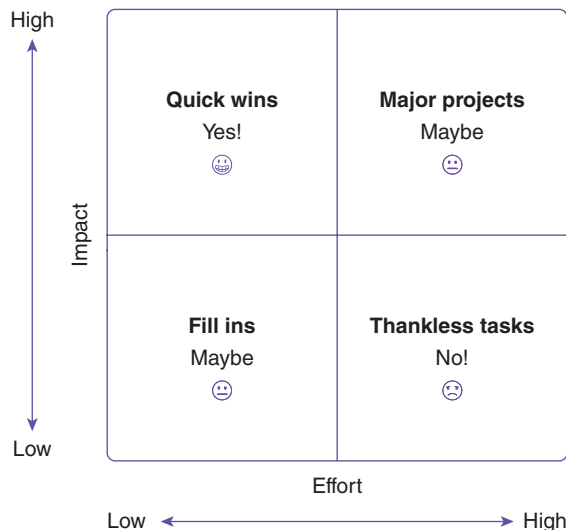


Figure 10.4 Impact and effort matrix

Source: Gray, 2010

And a plan should be reviewed! In Chapter 14, Integrating, Improving and Transforming Digital Marketing, we will consider how this happens, so you can stay ahead.

FURTHER EXERCISES

1. Think about your own skills – can you write, code or edit video? Visit one of the online marketplaces and, based on other people's listings, create your own profile and find out who in class gains an assignment first!

2. Organise a social media campaign for your university's marketing degree. First evaluate the different social media channels, based on the target audience, and recommend one channel to use in this campaign. Develop outline visuals and copy that could be used on this channel.
3. Create a digital marketing plan for an organisation of your choice, that embraces all aspects of the customer journey (see also Chapter 2, The Digital Consumer).

SUMMARY

This chapter has explored:

- How to apply the 7Ps in a digital context.
- The 9Ms of resource planning, which illustrated that it is much more than a budget and people.
- How to assemble a digital marketing plan.
- Social media campaign planning from setting objectives to developing the creative offer and messaging.
- The impact and effort matrix to ensure that the focus is on the areas where you will gain results, rather than the areas that will have little impact on the business.

11

SOCIAL MEDIA MANAGEMENT

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** the different types and functions of social media
- Apply** the purpose of social media within organisations
- Analyse** social media adoption
- Evaluate** the issues in managing social media within an organisation
- Create** a plan to manage social media within an organisation

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Create an outline social media policy
- Use a social media scheduling tool
- Create a social media strategy

11.1 INTRODUCTION

There are many types of social media and this chapter will make you more aware of the concepts around social media management at a personal and work level, so that you can better manage all aspects of social media.

Critical factors in social media management are explored with information on the different types of tools available for monitoring a brand online and key issues to consider when managing organisations in an online environment.

11.2 INTRODUCTION TO SOCIAL MEDIA

Social Media Networks (SMNs) started in 1996 with a platform called SixDegrees that later closed due to lack of interest at the time (boyd and Ellison, 2007). One of the reasons for the lack of interest is likely to be due to internet speed as most people with internet access around that time had dial-up internet connections (you had to click a switch to gain internet access) and the speeds ranged from 28.8 kbs to 56 kbs. Today if you have 4G you could have speeds of 40,000 kbs (that's 40 Mbs)! Imagine trying to send a photo with a speed of 28.8 kbs; it would simply never happen.

Today the most dominant current social media network in the United States and Europe is recognised as Facebook, launched in 2004 and now with over one billion active users. You may think that Facebook is in decline, but its numbers tell a different story. Each quarter, more users have joined the platform.

What has changed is that the social media networks started as a means to connect people but today they are big advertising companies and publishers. Table 11.1 shows the main social media platforms, when they were established, the worldwide monthly users, their current owners and their revenue model.

Table 11.1 Overview of main social media platforms

Platform	Established	Approximate worldwide monthly users	Owners	Revenue model
LinkedIn	2002	530 million	Shareholders via Microsoft (NASDAQ)	Recruitment, advertising, membership
Facebook	2004	1.8 billion	Shareholders (NASDAQ)	Advertising
YouTube	2005	1 billion	Shareholders via Google/Alphabet Inc (NASDAQ)	Advertising
Twitter	2006	330 million	Shareholders (NYSE)	Advertising
WhatsApp	2009	Not published	Facebook	Not monetised at present
Instagram	2010	600 million	Shareholders via Facebook (NASDAQ)	Advertising via Facebook ads platform
Pinterest	2010	200 million	Privately owned	Advertising
Snapchat	2011	300 million	Shareholders (NYSE)	Advertising

Sources: LinkedIn <https://press.linkedin.com/about-linkedin>

Facebook <https://investor.fb.com/home/default.aspx>

YouTube www.youtube.com/yt/advertise/en-GB

Twitter <https://investor.twitterinc.com>

Instagram <https://investor.fb.com/home/default.aspx>

Pinterest <https://about.pinterest.com/en/press/press>

Snapchat <https://investor.snap.com>

WhatsApp <https://investor.fb.com/home/default.aspx>

11.2.1 DEVELOPMENT OF THE MAIN SOCIAL MEDIA PLATFORMS

Looking at the main social media platforms in Table 11.1, the first of these mega social media networks to be founded, LinkedIn, is a business to business, rather than business to consumer, social media platform that has been described as a *corporate social networking* tool. In researching how the multinational corporation IBM uses social networking, Ann Majchrzak, Luba Cherbakov and Blake Ives (2009, p. 103) defined corporate social networking as: ‘the use of technology to help employees identify, in the interest of furthering the business of the firm: 1. Who knows what; 2. Who is interested in what; and 3. Who wants to contribute to what.’

LinkedIn was purchased by Microsoft and is likely to be embedded into the IT company’s ecosystem. It is notable that LinkedIn has a mixed revenue model, earning most income from recruitment solutions, not promotional advertising, unlike the other platforms. As a business to business system, it also generates an income via membership packages, enabling members to access different levels of network data.

Facebook has over one billion monthly active users and its core value proposition to advertisers is access to its user base, which is larger than most countries, except China and India. You might question the numbers, but as a stock exchange listed corporation, Facebook is subject to external scrutiny and to monitor the numbers of claimed users it created a measurement system, named ‘Monthly Active Users’ (MAUs) and ‘Daily Active Users’ (DAUs), which has inspired other social media platforms to adopt the same terminology.

YouTube has also claimed over 1 billion monthly viewers, although there is no documented evidence for this. Twitter, established one year after YouTube, has smaller user numbers, at over 300 million. Like Facebook, it is listed on the stock exchange and has shareholders controlling its destiny, with its income currently derived from advertising. WhatsApp, owned by Facebook, does not yet offer an advertising option although I am sure this will change. Also, Facebook doesn’t report WhatsApp stats yet.

Instagram is the next largest social media platform, with over 600 million monthly active users. As an image-sharing social network it is popular within the fashion, tourism and food sectors. Not everyone is aware, but Instagram is owned by Facebook which means that it is subject to the equivalent legal guidelines about user numbers.

With an estimated 150 million users, the smallest platform shown in Table 11.1 is Pinterest. A niche social media platform, it is said to be popular with early adopters. When Pinterest started, it was invitation-only. If you received an invite you could welcome 10 other people into the network. I remember gaining an invite and having the equivalent of 10 golden tickets to share amongst friends and co-workers. Everyone wanted to join. We devised a system so that I shared eight tickets and those eight shared amongst another eight – we could keep two tickets in reserve, for ‘just in case’ situations.

Although Pinterest is the smallest platform in this table, its user base is still larger than every country in Europe. Snapchat has started to share its audience numbers as it launched on the New York Stock Exchange. We will watch this space for more in the future.

11.2.2 DEFINITION OF SOCIAL MEDIA

There are many definitions of social media that were valid for their time, such as Hoffman and Novak’s (1996) definition: ‘a dynamic distributed network, potentially global in scope, together with associated hardware and software for accessing the network, which enables consumers and firms to (1) provide and interactively access hypermedia content (i.e., “machine interactivity”) and (2) communicate through the medium (i.e., “person interactivity”)’. Kaplan and Haenlein (2010) suggested that ‘social media is a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User-Generated Content.’

In this fast-moving environment these definitions are soon out of date and naming specific activities may account for emerging developments. Plus the majority of definitions are not memorable. It is difficult to adopt and embrace a definition if it is not straightforward to recall.

My alternative and concise working definition of social media (not social media networks) which is future-proofed and includes all possible connections is:

Social media is the facilitation of interactive, connected, marketing purposes at organisational, peer-to-peer and personal levels.

It’s easy to remember and demonstrates that social media is more than a communications channel, helping both consumers and organisations in many ways.

11.3 TYPES OF SOCIAL MEDIA

Having considered the dynamics of major platforms, it is helpful to consider the types or classification of social media because different social media brands have different purposes, which impacts on the digital marketing plan.

There have been efforts to classify social media networks by both practitioners and academics. The Interactive Advertising Bureau (IAB) considered types of social media in 2009, so that they could illustrate advertising opportunities (Interactive Advertising Bureau, 2009). The IAB provided three basic categories of social media tools:

- Social media sites
- Blogs
- Widgets and social media applications

Focusing on the format, rather than the function, this was a simplistic classification model that failed to describe the purpose or usage. As one of the earliest classifications, created in 2009 when revenue for internet advertising in the United States amounted to \$22.7 billion (PricewaterhouseCoopers, 2010), which had more than doubled to \$59.6 billion by 2015 (PricewaterhouseCoopers, 2016), this started the notion of categorising social media.

An alternative approach was taken by researchers Andreas Kaplan and Michael Haenlein, who described social media using theory (Kaplan and Haenlein, 2010). Kaplan and Haenlein took four recognised theories: (1) self-presentation; (2) social presence; (3) media richness; and (4) self-disclosure. We looked at self-presentation and self-disclosure theories in Chapter 5, Online Communities, so let's investigate these other theories further as they are often used in social media research.

11.3.1 SOCIAL PRESENCE THEORY

Social presence theory was first defined by John Short, Ederyn Williams and Bruce Christie as the 'degree of salience of the other person in the interaction and the consequent salience of the interpersonal relationships' (Short et al., 1976, p. 65). Charlotte Gunawardena subsequently provided an easier to digest definition: 'the degree to which a person is perceived as a "real person" in mediated communication' (Gunawardena, 1995, p. 151).

Social presence is influenced by the intimacy (interpersonal or mediated through a device) and immediacy (asynchronous or synchronous) of the medium. Social presence is often lower for mediated (e.g. telephone conversation) than interpersonal (e.g. face-to-face discussion) and for asynchronous (e.g. email) than synchronous (e.g. live chat) communications. Effectively, if you are speaking to someone face-to-face it's a different experience to chatting online. So in a nutshell, the higher the social presence, the larger the social influence that the communication partners have on each other's behaviour.

DISCOVER MORE ON SOCIAL PRESENCE THEORY

There is a useful article by Guoqiang Cui, Barbara Lockee and Cuiqing Meng in the *Journal of Education and Information Technologies*: 'Building modern online social presence: A review of social presence theory and its instructional design implications for future trends' (Cui et al., 2013).

11.3.2 MEDIA RICHNESS THEORY

Writing in *Management Science*, Richard Daft and Robert Lengel examined why organisations processed information and concluded that this was based on the assumption that the goal of any communication is the resolution of ambiguity and the reduction of uncertainty (Daft and Lengel, 1986).

You could think of an email from your tutor with your end of first-year grades, confirming that you have progressed. The purpose of the email is to let you know where you are and ensure you are prepared for your next year. It reduces any ambiguity and uncertainty, especially if some grades were lower than expected!

Considering that their work was created over three decades ago, Daft and Lengel (1986, p. 560) classified 'less rich' to 'rich media', with face-to-face being most rich and numerical documents less rich, as shown in Figure 11.1. However, if we consider email as being on the same level as item (3) personal documents, it may be better for the tutor to pick up the telephone and speak to you instead, especially if some grades were disappointing!

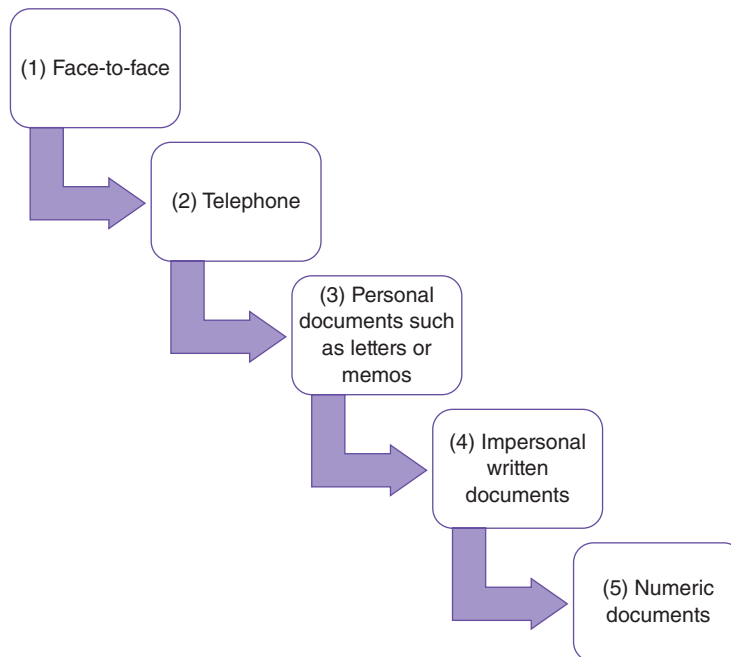


Figure 11.1 Increasing levels of media richness

Source: Adapted from Daft and Lengel, 1986

From studies into media richness we know that the richer the medium, the more effective it is. This explains the effectiveness of social media sites that contain richer information, from text to images and from emoticons to live video.

Having considered these different and also similar theories, to categorise social media Kaplan and Haenlein first blended social presence and media richness and secondly

self-presentation and self-disclosure, on their classification axes. Let's investigate the classification further, but first we should look at the visual representation in Figure 11.2 that they created.

		Social presence/Media richness		
		Low	Medium	High
Self-presentation/ Self-disclosure	High	Blogs	Social networking sites (e.g. Facebook)	Virtual social worlds (e.g. Second Life)
	Low	Collaborative projects (e.g. Wikipedia)	Content communities (e.g. YouTube)	Virtual game worlds (e.g. World of Warcraft)

Figure 11.2 Classification of social media by social presence/media richness and self-presentation/self-disclosure

Source: Kaplan and Haenlein, 2010, p. 62

Online content like Wikipedia is seen as low/low – low on media richness and presence and low on self-disclosure – after all, you never know the identity of the authors of the page and whether the content is accurate! At the other extreme, participating in a virtual world provides high levels of media richness and high levels of self-presentation.

Having provided this classification, as Kaplan and Haenlein noted at the time (p. 61), 'there is no systematic way in which different Social Media applications can be categorized. Also, new sites appear in cyberspace every day, so it is important that any classification scheme takes into account applications which may be forthcoming.'

Young Argyris and Kafui Monu researched the corporate use of social media (Argyris and Monu, 2015). They focused on four types of tools based on a survey via the *Harvard Business Review* which identified the instruments 'most commonly used for external communications' (p. 141). Within the four social media tools, shown in Table 11.2, they concentrated on 'backbone' features (p. 149) and, similar to Kaplan and Haenlein, they noted that this is a fast-changing environment and commented, 'listing all existing features of the four tools is not feasible or necessary because many tools are being constantly adapted and upgraded as the technology advances'.

Table 11.2 Prominent features of the four social media tools

Social media tools	Features
Wikis	Editable forum, search, multimedia support, web content management system, information structuring (hierarchy) and tagging.
Social networking sites	Profile, newsfeed, feedback, friend list, personal message, group and subscription/hide
Microblogging sites	Short message (tweet), metadata tag (hashtag), short-message sharing (retweet), follower list (contact list), and reply
Video-sharing sites	Video content, related video, comment, viewer counter and ratings

Source: Argyris and Monu, 2015, p. 149

11.4 BENEFITS OF USING SOCIAL MEDIA

Having considered the types of social media, the next question is how can they be used for organisations?

Students tend to know how to use social media at a personal level and are often hired on the expectation that this knowledge will translate into the workplace and you will understand how to manage social media for a range of organisations. Let's examine how social media can be used at work.

There are benefits from using social media at a personal level, as well as for organisations.

Benefits for consumers in brand engagement via social media include:

- **Entertainment** – to have fun
- Social **interaction** – to connect with others
- **Information** – to gain information
- Personal identity/status – to build online identity and **recognised** status
- **Communication** – to communicate with brands
- **Community** development – to be part of a community
- **Remuneration**/discounts – to gain offers and special deals
- **Purchase** – to shop
- **Reviews** and product rankings – to provide reviews
- Submit **opinion** on products/services – to share opinions
- **Customer service** – to seek customer service

Benefits for organisations include:

- To **entertain**
- To **interact**
- To provide **information**
- To gain brand **recognition**
- To **communicate**
- To develop an online **community**
- To provide **offers**
- To **sell**
- To gain product **reviews**
- To elicit **feedback**
- To deliver **customer service**

Looking into the business benefits of social media in more detail, Vilma Vuori and Jari Jussila (2016) in Finland developed a framework for a social media strategy which they called the 5C categorisation tool. The five categories are (a) communicating: publishing and sharing content; (ii) collaborating: collective content creation;

(iii) connecting: networking people; (iv) completing: adding, describing and filtering; and (v) combining: mixing and matching. Their summary, shown in Table 11.3, explained the purpose of each tool, with examples of the type of tool and possible applications.

Table 11.3 Summary of the 5C categorisation

5C categories	Purpose	Tools	Application examples
Communicating: publishing and sharing content	Publishing, discussing, expressing oneself, showing opinion, sharing, influencing, storing	Blogs, media sharing systems, discussion forums, microblogging, instant messaging	Blogger, WordPress, Flickr, YouTube, Periscope, Reddit, Instagram, Twitter, Tumblr, SlideShare, Prezi
Collaborating: collective content creation	Creating content together, collaborating, produsage	Wikis, shared workspaces	Wikipedia, TWiki, GoogleDocs, MatchWare, Trello, FlowDock
Connecting: networking people	Socialising, networking, connecting, playing, entertaining	Social networks, communities, virtual worlds	Facebook, LinkedIn, SecondLife, World of Warcraft, Habbo Hotel, Pokémon GO
Completing: adding, describing and filtering	Adding metadata, describing content, subscribing updates, combining, rating, serendipity	Tagging, social bookmarking, syndications, add-ons	Feedly, Flipboard, Pinterest, Foodgawker, StumbleUpon, Yelp
Combining: mixing and matching	Combining other tools and technologies according to situation and needs	Mash-ups, platforms	GoogleMaps, Hootsuite

Source: Adapted from Vuori and Jussila, 2016

The 5Cs is a useful way to help decide which tools are more relevant for organisations. It may be that an organisation you work at simply wants to communicate, so they may not need all the other platforms available.

KEY TERM PRODUSAGE

Professor Axel Bruns from Queensland University of Technology in Australia coined the term 'produsage' in 2006. He defined produsage as 'the collaborative, iterative, and user-led production of content by participants in a hybrid user–producer, or produser role' (Bruns, 2006, p. 276).

Activity 11.1 Application of the 5Cs

Think about an organisation of your choice. Use Table 11.3 as a framework and apply the 5Cs to the organisation. Investigate which applications they use and identify the purpose. Consider which categories work well and where they could improve.

See Template online: Application of the 5Cs

11.5 SOCIAL MEDIA ADOPTION AND IMPLEMENTATION

Using social media within organisations varies enormously. It depends on the senior management team and their understanding, as well as their commitment to purposefully use the platforms, rather than jumping on the proverbial bandwagon where you hear the words ‘we need Instagram because our competitors are using it’, which is hardly a strategy, but it’s scarily commonplace.

Social media adoption and implementation is a journey. It often starts with some form of experiment and registration with one platform, say Twitter or Facebook. Then there is some understanding of how the platform works and the benefit to business and this is followed with a greater adoption and focus.

So how we do measure or pinpoint where an organisation is in terms of its social media journey? Two researchers based in Ireland, Aidan Duane and Philip O’Reilly, developed a stage model of social media adoption, showing the five stages that businesses step through until social media is fully integrated into the organisation. This is a strategic model and identifies the organisation’s focus as well as the structure – if any – and the management involvement. Shown in Figure 11.3, it is a useful tool to assess organisations’ social media presence and to review their competitors. It provides a benchmark with a clear map of the next stage in the journey. If you are seeking a job interview with an organisation or working on a placement you could identify their current stage and recommend a digital marketing plan to increase social media adoption!

Stage	Strategy	Focus	Structure	Management
1. Experimentation and Learning	It is experimental with every department doing their own thing	Announcing launch of SMBP, posting a number of comments, images and videos, and providing some product/service information	Individual or departmental drive	None or very little involvement
2. Rapid Growth	It is coordinated across all departments by management, and a number of goals and objectives have been established	Consumer-centric focus. Efforts aimed at increasing internal and external awareness. Customers are encouraged to connect, follow, like, recommend, and comment on products and its service	Bottom-up widespread user participation coupled with top-down management	Support and encouragement
3. Formalisation	It is formalised and controlled across the company, with a strategy aligned with the business plan. Staff adhere to an established set of rules	Planning, strategy, governance and alignment with overall business strategy	A more centralised, corporate-driven model to coordinate efforts	Controlled by management

(Continued)

Figure 11.3 (Continued)

Stage	Strategy	Focus	Structure	Management
4. Consolidation and Integration	It is very well integrated with key business processes across the company, and it is driving a fundamental change in how we do business	Optimisation of processes and creating scale. Fundamental business change. Pursue alignment with external partners/suppliers. Co-creation/ideation, crowdsourcing emerge	Extension of corporate model to integrate external partners, suppliers, customers, communities, experts, etc. Micro-outsourcing of activities may also occur	Shared by management/staff
5. Institutional Absorption	It is embedded into the core of what we do, and how we do it, from customers to suppliers, from internal partners to external partners	De facto application for key business tasks. Enterprise-wide social media technologies for the entire workforce Generate new/reengineer existing business models	Aimed at customers, suppliers and partners, as business connectivity is transformed to establish wider business relationships	Shared by management/staff or decentralised

Figure 11.3 Stage model of social media adoption

Source: Duane and O'Reilly, 2016, p. 82

Activity 11.2 Investigation of the Social Media Adoption Stage Model

1. Select an organisation of your choice.
2. Investigate their online social media presence. Based on the stage model of social media adoption shown in Figure 11.3, analyse whether this is experimental, coordinated, formalised or fully integrated.
3. Make an appraisal, based on some research and select a stage and provide evidence or examples to support your claims.
4. Compare with classmates to see if different people have identified organisations at different stages.

See Template online: Stage model of social media adoption

11.6 MANAGING SOCIAL MEDIA

Having agreed which types of social media applications might be used and where the organisation is in its journey, the next step is managing social media, but where should you start?

Writing about the needs of financial institutions, researchers Jeffrey Loop and Alexander Malyshev identified five requirements for managing social media (Loop and Malyshev, 2013), which could be applied to a range of organisation types:

1. Risk management programme
2. Governance structure with clear roles and responsibilities
3. Policies and procedures regarding use and monitoring
4. Employee training programme
5. Due diligence process for selecting and managing third-party service providers

Other researchers have considered factors in managing social media too. Moving from requirements to roles in examining strategic responsibilities in social media management, public relations experts Marlene Neill and Mia Moody (2015) identified nine job roles with responsibilities for social media:

- Policy Maker: Developing policies for employee use of social media
- Technology Tester: Choosing new social media channels and software
- Communications Organizer: Creating and distributing messaging, scheduling posts, and monitoring conversations and sentiment
- Issues Manager: Identifying potential crises through monitoring of social media channels and developing protocols for responding to negative comments
- Relationship Analyzer: Identifying and engaging with influencers such as the media
- Master of Metrics: Choosing appropriate metrics for social media channels and reporting results, may involve budgeting and selecting external services
- Employee Recruiter: Portraying their company/organisation as an attractive place to work, using social media to recruit new employees, screening job applicants' social media profiles, and using social media to recruit candidates
- Policing: Educating employees about the social media policies, putting controls in place and notifying employees of inappropriate conduct; controlling number of social media accounts on various channels
- Internal Collaborator: Working with other internal departments to manage social media channels

What's interesting is that several of their themes cross over with those identified by Jeffrey Loop and Alexander Malyshev.

Let's explore each of Loop and Malyshev's five recommendations, combined with the work of Neill and Moody, to understand why they matter and how this could work in practice.

11.6.1 RISK MANAGEMENT PROGRAMME

Similar to a crisis PR plan, a risk management programme would identify potential risks and recommend mitigation should these occur. It is important to be prepared for unexpected events, as in social media bad news spreads fast. This is not just my intuition (and possibly yours) but is also based on formal research. Computer scientists Anna Fang and Zina Ben-Miled (2017) in the United States conducted a survey using

news about Brexit on Twitter to prove this. Their results indicated that bad news had a higher re-tweet ratio, and was shared and spread further on Twitter.

KEY TERM EWOM (ELECTRONIC WORD OF MOUTH)

The accepted definition for eWOM or electronic word of mouth was created in 2004 by Thorsten Hennig-Thurau and his colleagues as:

any positive or negative statement made by potential, actual, or former customers about a product or company, which is made available to a multitude of people and institutions via the Internet. (Hennig-Thurau et al., 2004, p. 39)

Sharing news online is often referred to as **eWOM** (see Key Term) and will have a positive, negative or neutral **valence** (see Key Term) or tone. Jacob Hornik and his colleagues noted that other researchers suggested that negative information may draw more attention due to the surprise factor and could also have greater impact (Hornik et al., 2015). To address this, Marlene Neill and Mia Moody identified several dedicated roles: 'Issues Manager', 'Communications Organizer', 'Relationship Analyzer' and 'Employee Recruiter', all of which manage social media content within organisations. These roles will become more popular as social media continues to grow. The change will be that greater expertise will develop based on both the experience and theory that's being created.

Before launching an activity on social media, you may decide to evaluate the risk. See Case Example 11.1 #AMA Ask Me Anything for an example of an evaluation.

Case Example 11.1 #AMA Ask Me Anything Risk Evaluation

A long-established, smaller charity that collects and redistributes clothing was considering a change in policy. The directors had embraced social media and were very enthusiastic about asking fans if they would agree to this. The mechanism was through an **#AMA** session for one hour on Facebook (see Key Term – Ask Me Anything #AMA in Chapter 8, Audit Frameworks).

The idea was that questions would be posed on Facebook and the fans or other respondents could ask anything in the one hour allocated and the charity would need to respond.

With over 100,000 Facebook fans this was a brave aim and I asked if we could conduct a risk evaluation before launching the event. It was agreed that we could evaluate the potential risk of holding the event and we would present our findings back to the senior management team. The risk evaluation summary is shown in Table 11.4.

Table 11.4 Risk evaluation for an #AMA event

Factor	Issues
Agree specific aims for the session – what did we want to achieve?	Clear aims agreed
Was the #AMA the only way to achieve the aims?	Aims could be achieved outside Facebook, via surveys or focus groups
Imagine every possible scenario that could happen, list every ‘what if’ situation that could occur	What if we missed something big?
Create a response for all scenarios	Again, what if we missed something big?
We need to consider the potential for trolls to invade the session and take over. How would we respond?	We would need to recruit additional help and could risk brand reputation
We should plan the response team who would be involved in responding to comments	Small team, and although others could be brought in, they would need training, which requires additional investment
We need to monitor several channels as this could spill over from Facebook to Twitter and beyond	How many channels and how could we do this? We could use a social media management system, but there’s a time lag with many of these and they might miss critical factors
As messages can be circulated for hours afterwards (Laufer and Brassell-Cicchini, 2013), for how long would we monitor the channels?	We might need to organise a shift system as some people may join in the conversation much later at night. Investment needed to manage this

Having evaluated the potential risks we recommended that the #AMA should not go ahead. The risks were too great, the team too small and additional investment would be required. The senior management team agreed. The decision was to explore the change in policy using other means, such as focus groups or online surveys. These would be within a closed environment and less susceptible to the external negative backlash that could occur.

Case Questions

- Was it a good decision not to go ahead with the #AMA?
- Are there any risks we should add to the evaluation that we missed?
- Can you think of a situation where an organisation has gone ahead with an event or activity online and it went wrong?

11.6.2 GOVERNANCE STRUCTURE WITH CLEAR ROLES AND RESPONSIBILITIES

Ensuring no laws are broken and everyone knows who is in charge is critical in any aspect of business, so this is not a surprising addition. The challenge in social media management is that often the senior management team don’t always understand social media. To a certain extent the ‘Policy Maker’ role, defined by Neill and Moody (2015), meets these requirements and the ‘Technology Tester’ role may also have a part to play to ensure appropriate channels are selected from the start.

KEY TERM VALENCE

In psychology and marketing, valence means the strength of an emotion.

Usually considered on a binary scale such as positive or negative, attractive or repulsive, it is often referred to as message valence and in research is often combined with message frequency (volume).

Message valence is used during elections to measure positive and negative messages about candidates. An example is an investigation into the role of valence in online reviews by Nathalia Purnawirawan and her colleagues (Purnawirawan et al., 2015). Their research found that the review valence had an impact in influencing attitudes – perhaps not altogether surprising, but it demonstrates the importance of positive online reviews!

DISCOVER MORE ON VALENCE

These articles consider valence in different settings.

- ‘Understanding branding in a digitally empowered world’ by Tulin Erdem and colleagues, published in the *International Journal of Research in Marketing* (Erdem et al., 2015).
- ‘The role of emotions for the perceived usefulness in online customer reviews’ by Armin Felbermayr and Alexandros Nanopoulos, published in the *Journal of Interactive Marketing* (Felbermayr and Nanopoulos, 2016).
- ‘Social media and relationship development: The effect of valence and intimacy of posts’ by Amy Orben and Robin Dunbar, published in *Computers in Human Behavior* (Orben and Dunbar, 2017).

11.6.3 POLICIES AND PROCEDURES REGARDING USE AND MONITORING

Marlene Neill and Mia Moody see this requirement being managed within a policy maker role and they suggested that this may involve staff from PR and human resources along with legal teams. Whilst this is likely to be the case in larger organisations, in smaller firms, this role and others may be given to one person.

The whole area of social media policy is a mess. Technically when you start work and sign your employment terms and conditions, this will generally include a clause about focusing on working at work (rather than messaging friends on WhatsApp and sharing Snaps) and often there’s a sentence about ‘not bringing the firm into disrepute’ – saying or doing something you shouldn’t. But, this is the issue: most people don’t translate the idea of using social media as breaking the rules.

And it gets worse. On one hand organisations want you to engage with customers, on the other they don't want you spending time on social media. One example is shown in Case Example 11.2, which looks at the National Health Service and social media.

The issue regarding social media and policy is that it is still in its infancy. Policies tend to be created after legislation has been passed and there is still a lack of legal precedents in this domain. In the United States Kimberly O'Connor and Gordon Schmidt have written articles about staff being fired for comments on Facebook (Schmidt and O'Connor, 2015) and also students being suspended for inappropriate use of personal social media (O'Connor et al., 2016) (see Ethical Insights: Sacked for social media).

Ethical Insights Sacked for Social Media

Be careful what you tweet and post! Twitter's terms of service state 'You should only provide Content that you are comfortable sharing with others' (Twitter, 2017, p. 9), yet many people have been sacked for speaking badly about their workplace or co-workers on social media.

In 2017 a long-serving employee, Mrs Plant, published negative comments about her employer, API Microelectronics Ltd, on Facebook. Several colleagues talked about the post and her employer invited her to explain the comments. As they were not satisfied with the explanation, she was sacked under the company's policies. She was unhappy about this, feeling that it was unfair, so took her case to court. The court found that she had been given sufficient advice by the company regarding social media settings and she was in breach of the social media policy and therefore she lost her case (and her job).

Her post is now forever public. It is available online via the UK's Ministry of Justice website and anyone searching for her name in the future will find the whole sorry story. Whilst the post doesn't seem too bad (I have seen much worse), it had a negative impact on the company and was shared with colleagues who re-shared it amongst a wider group (Ministry of Justice, 2017).

There are many situations like this and they are growing on a worldwide basis. For more examples read the article 'Fired for Facebook: Using NLRB guidance to craft appropriate social media policies' by Gordon Schmidt and Kimberly O'Connor (2015).

Smartphone Sixty Seconds® – Seeking Tribunals

- On your mobile phone, search for Mrs E Plant v API Microelectronics Ltd: 3401454/2016
- You will find the employee tribunals page and can open the entire court transcript.
- In the employee tribunals page you can also search for 'social media' and filter by organisations – select 'Ministry of Justice' as the filter.
- How many cases can you see?

However, the entire legislative system in the United States is different from European and UK law, so until more legislation is in place and social media usage is fully understood, the roles of the policy maker and policing will continue to be needed. One short-term solution is a form of social media policy and if you are not sure where to start with that, see Digital Tool: Social media policy maker.

Digital Tool Social Media Policy Maker

Creating a social media policy involves answering a few questions. Whilst it is not a substitute for a properly prepared legal agreement, this blog article is a great starting place to understand what is needed in a social media policy.

To use the tool, visit the website and look at the 12 questions. Work through each one to create your outline policy!

- See <https://blog.hootsuite.com/social-media-policy-for-employees>

11.6.4 EMPLOYEE TRAINING PROGRAMME

Many researchers recommend training in social media usage for several reasons:

- To inform about policy
- To educate about the influence of a message
- To understand the language and terminology within the policy
- To explain the impact on future careers.

The fascinating fact is that most training is aimed at employees. However, when big mistakes happen online, they can be due to the senior management team! And it is not just about the misuse of social media, it is also about poorly considered campaigns that go wrong on social media. Marlene Neill and Mia Moody recommend an ‘internal collaborator’ role to manage this and it may be that if marketing and legal had a conversation about possible campaigns, there would be fewer campaigns that end up on Twitter as #fail stories!

11.6.5 DUE DILIGENCE PROCESS FOR SELECTING AND MANAGING THIRD-PARTY SERVICE PROVIDERS

As Jeffrey Loop and Alexander Malyshev were writing in a law journal, it is not unusual that they included an element of due diligence or reasonable steps to avoid

committing an offence. Applied to digital marketing, we would probably consider this some form of appraisal to verify security measures and understand how the system worked as well as keeping data safe. The ‘technology tester’ role might be useful here, as could the ‘master of metrics’ who may notice unusual activity and remove potentially difficult situations before they developed.

The process could be as complex or simple as the organisation needed. We have looked at issues concerning managing social media online; the next factor is about customer data. To advertise on Facebook (or Instagram) you might share your customer database. How do you know it will be secure with so many hacks taking place? If the data is not secure there could be big fines ahead (see Key Term – **General Data Protection Regulation (GDPR)**, p. 19).

One example is a large supermarket in the United States, Target, who suffered a major data breach when one of their service providers fell for a phishing email. The end result was Target agreeing to pay out around \$10,000 per customer whose personal and financial details were hacked (Kluwer, 2015).

This indicates that it is not just staff that need training, but third-party suppliers too.

11.7 TOOLS FOR MANAGING SOCIAL MEDIA

Having understood the issues in managing social media, the next question is how? Whilst there are agreed job roles, social media is a 24/7 always-on environment so how is it possible to monitor and manage all comments and stay up to date?

There is a plethora of tools to manage different aspects of social media, which I will discuss in this section.

11.7.1 SOCIAL LISTENING

Social listening involves monitoring conversations about a brand or other organisation. In a pre-digital era a conversation between a consumer and a company tended to be a monologue (one-way conversation), which is classic communications theory. The organisation broadcast its message to its audience and there was little opportunity to respond. Imagine responding to an advert in a newspaper – much more effort than commenting on an advert on Facebook! The one-way ‘conversation’ or monologue was limited by the lack of technology. A comment was made, followed by a response. Without technology, this could take days or weeks.

Over time, this moved towards a dialogue where, for example, if you emailed a company and gained a response, a two-way discussion started. This evolved and became a triologue where a three-way conversation could take place with different people entering into the conversation or debate. For the first time, people could add comments after content such as a blog post and others could contribute their feelings too.

The advent of web 2.0 changed the dynamic. A key change in technology enabled individuals to comment and share opinions between each other, potentially mentioning the brand name but not speaking directly to the brand. These multi-way

communications are known as polylogal conversations or a polylogue. We could also call this a totally messy conversation – a bit like being at a party where five people are speaking at once to everyone!

Having seen that all these conversions are taking place at the same time, what are the best ways to monitor what's happening? You can monitor mentions of the brand name or product types and you can analyse the valence using **sentiment analysis** tools (see Key Term in Chapter 3).

Although sentiment analysis can be automated, the computing tools have a downside as they are unable to detect sarcasm, humour and irony. Marketing researchers Ana Isabel Canhoto and Yuvraj Padmanabhan (2015) conducted a comparative study of automated versus manual analysis of social media conversations and their results show flaws in many computing tools. This software is still at an early stage and improving, but it is worth sampling some content manually, as a sanity check, if you conduct this type of research.

You may wonder why you would bother monitoring the brand name. This is for several reasons. Firstly, it allows you to provide customer service where it's needed – customers don't always shout on your doorstep; they may be somewhere else, such as in a forum or on a Facebook page. Secondly, you can identify potential influencers and brand ambassadors who speak positively about the organisation. Thirdly, you can provide advice where needed.

There are many sophisticated social media monitoring and management tools, as shown in Table 11.5. It is worth noting that the creation of social media tools is one of the fastest growing businesses in social media, and with fees from a few dollars a month to hundreds of thousands of dollars a year, you can see why!

Table 11.5 Social media monitoring and management tools

Brand monitoring	Scheduling	Content management	Management and reporting	Customer service	Company	Web address
X	X		X		Agora Pulse	agorapulse.com
	X				Buffer	buffer.com
		X			Content Cloud HQ	contentcloudhq.com
		X			CoSchedule	coschedule.com
X			X		Crimson Hexagon	crimsonhexagon.com
X	X		X		Edgar	meettedgar.com
X			X		Gorkana	gorkana.com
X	X				Hootsuite	hootsuite.com
X			X	X	Marketing Cloud (was Radian 6)	marketingcloud.com/au/products/social-media-marketing/radian6/
		X			Netvibes	netvibes.com

Brand monitoring	Scheduling	Content management	Management and reporting	Customer service	Company	Web address
		X			Social Bakers	socialbakers.com
X	X	X	X	X	Orlo	Orlo.tech
X			X	X	SparkCentral	sparkcentral.com
X	X		X	X	Spredfast	spredfast.com
X			X		Sprinklr	sprinklr.com
X			X		Sysmos	sysmos.com

These tools provide a range of functions from monitoring conversations and alerting teams when a crisis may be starting, to joining up each aspect of the customer journey to better attribute conversion actions.

11.7.2 SCHEDULING TOOLS

Scheduling tools allow the user to schedule or plan in advance the content to be issued. This means you can schedule a whole month's worth of tweets in a single hour.

Where content is **evergreen** (see Chapter 4, Content Marketing, p. 109) and has no sell-by date, it can be used at any time and is useful in this situation. Other times when scheduling might be used is when an organisation is exhibiting at an event and they provide a countdown, as well as reminders, to attend their booth or exhibition stand.

Activity 11.3 Use a Social Media Scheduling Tool

Go to [Hootsuite.com](https://hootsuite.com)

- Select PLANS and FREE.
- Register for a free account and connect your Twitter account.
- Prepare and schedule some posts.
- Search for a subject of interest, add as a content stream and monitor for 10 days.

11.7.3 CONTENT MANAGEMENT TOOLS

Content management tools are slightly more sophisticated than simple scheduling tools and enable you to search for content streams, share content plans across teams and manage when content is issued. If you are a fashion business, you may create a content stream that follows London Fashion Week or Paris fashion houses. You can

see all the conversations in one place, as can your team. If you promote a hashtag for an event, you can establish a content stream to monitor the hashtag use.

Digital Tool Hashtag Finder

If you are thinking about using a hashtag it is a good idea to see if it has already been used. These free tools allow you to see if, when and where the hashtag has been used:

- HashAtt.com
- hashtagify.me

11.7.4 MANAGEMENT AND REPORTING TOOLS

Management and reporting tools look at the amount of **engagement** (see Key Term) your social media content attracts, as well as the positive and negative valence or sentiment surrounding the brand, product or organisation.

Although these tools provide insights – which are also freely available via the social media platforms – the difference is that these tools aggregate the data into one page or report. If you were to get a job as a social media manager, you would probably appreciate the time that this would save! As you might imagine, such fabulous time-saving tools also come with a price tag. At the top end you might budget £500,000 a year for a comprehensive social media management and reporting tool suite.

KEY TERM ENGAGEMENT

Engagement or consumer engagement is broadly explained as a customer's psychological and emotional relationship with an organisation. The concept was first suggested in the field of marketing in 2005 as Roderick Brodie and his colleagues undertook an exhaustive review of when, where and how engagement was used and explained the concept in some detail. As a result they offered their own definition of engagement based on five fundamental propositions assembled from their research:

Customer engagement (CE) is a psychological state that occurs by virtue of interactive, cocreative customer experiences with a focal agent/object (e.g., a brand) in focal service relationships. (Brodie et al., 2011, p. 261)

11.7.5 CUSTOMER SERVICE TOOLS

As the name indicates, these tools provide a customer service function. Usually across several teams, these tools enable managers to allocate support notices or tickets to different individuals as they occur. So if I contact a brand with an issue about a product, or delivery or a general enquiry, it can be filtered to the right team to provide a speedy response.

Typically these tools are charged on a licence basis, so if I have 150 staff I pay for 150 licences. There is often a minimum monthly fee which makes some of these tools too expensive for smaller organisations.

Bringing all the social media management skills together, Case Example 11.2 shows an example of best practice applied to a small charity with limited resources. This is also a blueprint for a social media strategy.

Case Example 11.2 Midlands Air Ambulance Charity Social Media Strategy

The air ambulance in the UK is an amazing service that is a collective of registered independent charities, often based on regions, that all provide helicopter emergency medical services. If critical medical help is needed, the air ambulance may be called even if a land ambulance is present.

The Midlands Air Ambulance Charity funds and operates three air ambulances across six Midlands counties: Gloucestershire, Herefordshire, Shropshire, Staffordshire, Worcestershire and the West Midlands. This constitutes the largest air ambulance operating region in the UK. The charity also provides secondary cover to the surrounding areas, such as Warwickshire and mid-Wales.

They have adopted a social media strategy, which we will explore here.

Conduct a Social Media Audit

Before using different social media channels, they reviewed other charities to see how they used social media. This provided useful background to better understand what channels to consider and the potential resources required.

Create Social Media Marketing Strategy and Goals

The Midlands Air Ambulance Charity has aligned its digital marketing and social media strategy and uses the social media framework (see Chapter 9), as shown in Table 11.6.

Research Your Audience

Their audiences include supporters, volunteers, survivors, corporate supporters, air crew and staff. The levels of engagement vary between groups.

(Continued)

(Continued)

Table 11.6 Midlands Air Ambulance Charity aligning the digital marketing and social media strategy

Digital marketing strategy	Social media strategy
Awareness	Share information
Consideration	Audience engagement
Conversion	Fund-raise
Evangelism	Recognise supporters and volunteers

Build Your Social Media Accounts

The charity's primary social media channels are Facebook, Twitter and LinkedIn. These are regularly updated and generate significant interaction in terms of traffic, engagement and messages.

Another social media account under consideration is Instagram. The challenge is the way this platform works as it is not possible to schedule content. As images need to be added immediately, it could be dangerous if the social media manager creating the content has their own Instagram account on their own phone and forgets to switch accounts when posting!

Create Content Calendar

The Digital Communications Coordinator has created content themes as well as calls to action. There are guidelines on posting frequency so that the charity is not 'too noisy' and seen to be spending all day posting on social media channels.

A master **content calendar** (see Key Term in Chapter 4, p. 111) has been created, based on the strategic plan and the communications plan. This included identifying (a) a theme for each month; (b) a focus on events; and (c) any relevant external content.

A more detailed monthly content plan is developed with topical or other pertinent material.

Post, Listen and Engage

There is a process in place to listen to the audience:

- Positive comments are shared and liked.
- Negative comments may initially be ignored if not relevant. If there is a specific issue, the individual is messaged to try and provide a resolution. If the content is abusive or offensive, the individual may be blocked.

Track and Measure Results

A monthly report is created to measure the activity against the social media goals. This tracks how information has been shared and the audience engagement.

Recognition of the supporters and volunteers is measured through the number of shares, especially of images demonstrating fund-raising activities.

There are plans to attribute donations, although many of these can occur offline with donations in shops, giving at events or other activities.

Review and Improve

Quarterly update meetings look at overall activity and if improvements are needed. This raised the question about Google+, and with so few people using the network there was a question as to whether to continue. On balance it was decided to continue adding content for a further six months as Google+ is beneficial for search engine optimisation, rather than real engagement.

An annual review takes place for a more in-depth review and to develop the outline content calendar for the following year.

Case Questions

- Identify an example of best practice of social media management.
- Explain why you selected this example and how the best practice is demonstrated.

FURTHER EXERCISES

1. Identify and justify the benefits of using social media, for either a fashion retailer, a games company or a sports organisation.
2. Discuss the risks of using social media for an organisation of your choice and provide recommendations on how these risks could be mitigated.
3. Create a plan to manage social media within an organisation. This should address responsibility for sharing content and identify the roles required within the team.

SUMMARY

This chapter has explored:

- The type of social media available for organisations.
- How social presence and media richness theory apply to social media usage.
- The benefits of social media for organisations.
- Factors in social media adoption by organisations.
- The different tools available for social listening and online management.

12

MANAGING RESOURCES

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** all types of resources within organisations
- Apply** resource-based theory to organisations
- Analyse** the SAF framework
- Evaluate** roles and responsibilities using the RACI matrix
- Create** suitable options for an organisation using the SAF framework

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Assess your personal digital skills to understand what type of digital marketer you are
- Apply a resources framework to identify gaps in an organisation
- Recommend digital staffing models

12.1 INTRODUCTION

This chapter explores issues in managing resources with useful frameworks to ensure no elements are missed. You will discover more about different digital marketing roles and understand if you are a T-shaped web marketer or if you need to add some skills to your portfolio.

The SAF framework will show if you have selected the right resources, and at the end of this chapter you will better understand how to manage resources, whether at home, university or work.

12.2 WHAT ARE RESOURCES?

Resources in organisations refer to the assets, from the people to the processes and the knowledge to the networks. Resources are the reasons why organisations succeed, and in digital marketing all actions, and therefore all resources, can be measured, so that it is easier to understand what contributes to an organisation's success.

This is not just my view, it is recognised in business management and practised by successful organisations, as well as being supported by academic theory.

The Danish economist and management theorist Birger Wernerfelt explored the resource-based view of the firm (RBV), which subsequently evolved into resource-based theory (RBT). Wernerfelt's work took place at a time when success within an organisation, especially business, was deemed to be down to the product mix, whereas he suggested that both products and resources needed to be considered. He proposed examples of resources such as: 'brand names, in-house knowledge of technology, employment of skilled personnel, trade contacts, machinery, efficient procedures, capital' (Wernerfelt, 1984, p. 172).

Whilst Wernerfelt provided some initial examples of resources, this has developed into a broader list to incorporate: tangible or intangible aspects of the business; physical or human processes and intellectual property (Davicik and Sharma, 2016), and RBT is used in marketing strategy, international marketing and marketing innovation (Kozlenkova et al., 2013).

DISCOVER MORE ON RESOURCE-BASED THEORY

Read 'Resource-based theory in marketing' by Irina Kozlenkova and her colleagues in the *Journal of the Academy of Marketing Science* (Kozlenkova et al., 2013).

Thinking about turning resources into assets, for the tech giant Amazon its processes are its key resource: the systems in place to deliver goods ordered online the next day, or the same day in some locations.

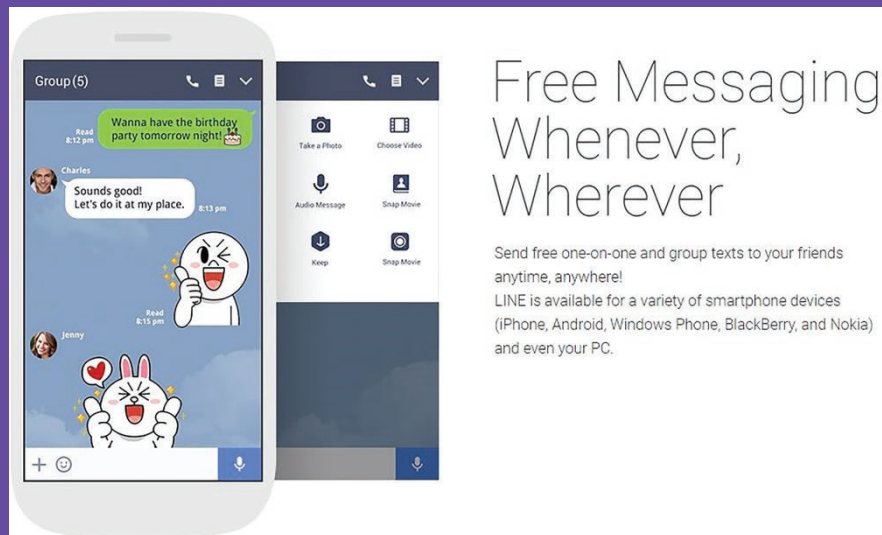
Case Example 12.1 Line Adapts Internal System As New Social Media Platform

The social media system Line (see <https://line.me/en>) started as a web-based internal communication process for employees of NHN in Japan. It became so popular inside the organisation that it was decided to turn their system into a product and it was released across Japan for use by anyone, not just company employees.

Seemingly similar to WhatsApp and Snapchat, Line operates on all mobile devices and PCs – that's what makes it really different, a multi-device messaging system.

Plus, Line is said to be more fun, with many stickers, animated profile pics, group video chat and the ability to send lots of images and videos at the same time.

Line is a clever example of maximising the value of a system as a resource and is said to have around 200 million monthly users. It generates additional company income through the sales of stickers, animations and other kit in its marketplace.



Free Messaging Whenever, Wherever

Send free one-on-one and group texts to your friends anytime, anywhere!

LINE is available for a variety of smartphone devices (iPhone, Android, Windows Phone, BlackBerry, and Nokia) and even your PC.

Figure 12.1 Line messaging system

Source: <https://line.me/en>

Case Questions

- Have you or anyone you know worked in an organisation where the process has become the business?
- Have you worked in organisations where the systems are a pain and stifle the resources?

12.3 DIGITAL MARKETING HUMAN RESOURCES

In digital marketing there is a concept known as the ‘T-shaped web marketer’. It was started by Tim Brown, the chief executive of international design agency IDEO, who suggested the notion of T-shaped stars in an interview with the Chief Executive website in 2010 (Hansen, 2010) and this evolved into the T-shaped web marketer when Mike Tekula, from an online marketing agency, discussed how and why to build a ‘T-shaped web marketing skill set’ (Tekula, 2012, p. 1).

He also created a much-shared diagram, shown in Figure 12.2, which shows the skills in the shape of the letter T.

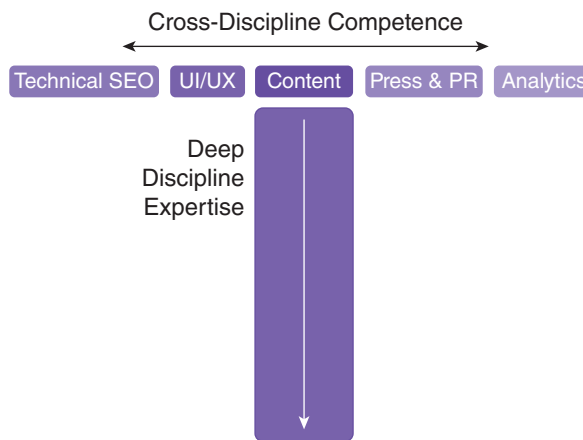


Figure 12.2 The T-shaped web marketing skill set (Tekula, 2012)

Source: www.distilled.net/blog/seo/building-a-t-shaped-skill-set

Mike Tekula’s discussion focused on search engine optimisation (SEO) and he advocated a T-shaped marketer who could grasp a wide range of digital marketing projects and had an added specialism. He considered the alternatives to the T-shaped marketer as those at two extremes: those with no specialism – jack of all trades, or those that could only contribute on a narrow focus with a single specialist skill.

A person with broad skills and expertise could work with other teams and have some understanding of the bigger picture. He mentioned and dismissed the idea that people should become a jack of all trades, which was suggested by Tim Ferriss, the American businessman and author of the ‘four-hour work week’ (Ferriss, 2007).

Rand Fishkin, long-time SEO expert and founder of the software company Moz, extended the concept of the T-shaped marketer further and adapted the original image to build in more digital marketing roles, as illustrated in Figure 12.3.

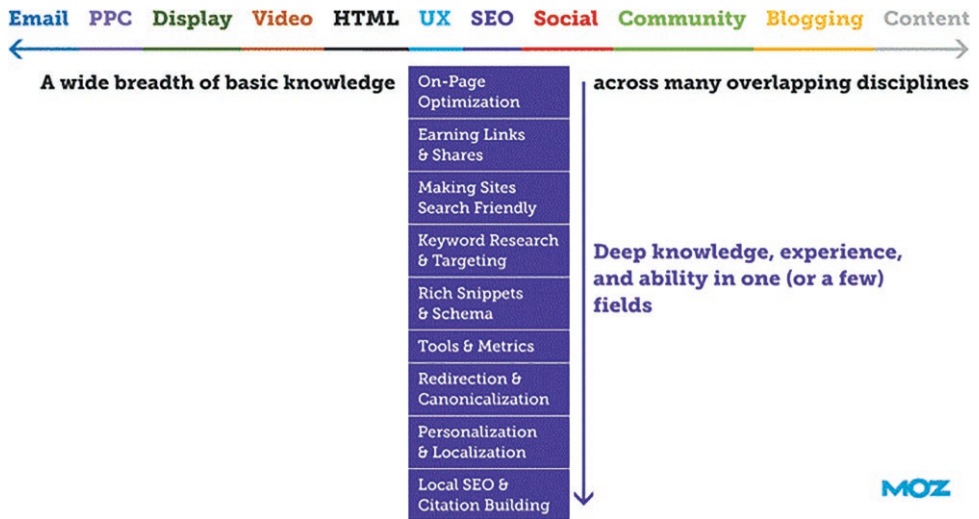


Figure 12.3 The T-shaped web marketer (Fishkin, 2013)

Source: <https://moz.com/rand/the-t-shaped-web-marketer>

In the future, digital marketing will simply be marketing. Right now it's seen as a separate area as there are many people classically trained in marketing, public relations and copywriting who are defending their roles and retaining separate departments. It takes time, often generations, to bring in entirely new concepts and digital is still considered new. Whilst this situation exists we need to consider staffing models for digital marketing teams.

12.3.1 NEW DIGITAL MARKETING ROLES

Digital marketing has created new digital management and specialist job roles such as those shown here.

Digital management and admin roles

- Head of Digital Marketing
- Head of eCommerce
- Digital Strategist
- Digital and Social Media Manager
- Social Media Community Manager
- Digital Marketing Manager
- Digital Project Manager
- Digital Account Manager

- Digital Marketing Executive
- Online Marketing Executive
- Digital Marketing Coordinator
- Digital Communication Coordinator

Specialist digital roles

- Digital Product Owner
- Digital Content Lead
- Digital Copywriter
- Strategic Digital Content Executive
- SEO and Content Executive
- SEO Specialist
- PPC Executive
- Programmatic Trading Manager
- Paid Search Executive
- Insight Analyst
- Senior Digital Designer
- Digital Designer

Smartphone Sixty Seconds® – Exploring Digital Job Roles

- Take out your mobile phone and search for 'digital marketing jobs'.
- You will probably find an online job board or job website where they list the different jobs.
- How many jobs are available for digital marketing?
- Can you see any new or emerging roles that are different from those listed in this chapter?

There is a question about who manages these newer roles and where they fit into the organisation. There are five approaches to managing the team, depending on when and how the organisation was established. These team formats and the rationale for each approach are discussed here.

Marketing team

This approach is where the senior marketer, whether the marketing manager or director, does not understand digital. There may be one or two specialists in different departments within the company or all their digital work may be managed by agencies.

Marketing team and communications team

More often this team format exists in public sector organisations, major corporations with shareholders or when external communications represent a significant part of the organisation. Social media community managers may sit inside the communications team rather than in the marketing team.

Marketing team and digital team

This often happens where there is a long-established marketing team and digital is seen as a new idea and a new team is introduced, often with a new digital marketing manager.

Digital marketing team

Newer organisations that were launched in a digital environment or those where digital has become the critical part of the business tend to embrace all marketing roles in a single digital marketing team.

Integrated marketing team

This approach is where the senior marketer, whether the marketing manager or director, understands digital and incorporates all staff into one overarching marketing team.

One of the difficulties with separate teams is that they can operate in silos, as mentioned in Chapter 10, Building the Digital Marketing Plan. This leads to weaker plans and complications with communications as teams don't always share all activities with each other!

Some organisations have additional product teams, web teams and ecommerce teams, all of which may involve some of the digital marketing specialists. One of the ways around this is to organise project teams or working groups, where members of staff from different departments work together on a single project. If you are at university and have had group assignments you may have discovered that some groups work better than others! There are reasons for this and we will explore **roles and responsibilities in groups** in the next section.

Activity 12.1 Are You a T-Shaped Web Marketer?

Assess your skills that you have gained whilst at university and perhaps in a part-time or other role:

1. What are your key skills and how are these evidenced on LinkedIn?
2. Look at the gaps in your skill set and make a plan to build your personal portfolio for when you leave university.

12.4 ROLES AND RESPONSIBILITIES IN GROUPS

Clarity is essential to understand who is doing what and when in any organisation or with any type of project. It also ensures there are no gaps and no duplication. It removes confusion and assigns clear accountability for specific areas.

12.4.1 THE RASCI AND THE RACI MODELS

There are two popular models for identifying roles and responsibilities in a group or project: the **RASCI model**, which stands for Responsible, Accountable, Supportive, Consulted and Informed (Hightower, 2009) and the **RACI model**, which represents Responsible, Accountable, Consulted and Informed (Project Management Institute, 2013).

The eagle-eyed among you will have noticed that the only difference between the two is that the earlier RASCI model included an additional feature as a supporter or supportive role, which we might call a project assistant. The newer RACI version removed this, as shown in Table 12.1.

Table 12.1 The RASCI and RACI models

Factors	RASCI model (Hightower, 2009)	The RACI model (Project Management Institute, 2013)
Responsible	Those responsible for carrying out the task	These people have responsibility for certain tasks
Accountable	The person who approves or 'signs off' the task	The person accountable for the job in hand who will give approval
Supportive	Those who support the implementation	N/A
Consulted	Those who have information and the capability to complete the task	These people would like to know about the task and their opinions are needed before a decision is made or action taken
Informed	Those who should be notified of the outcomes	This group get one-way communication to keep them up to date with progress and other messages after a decision is made or action taken

Project management is a science in its own right and there is a formal system called PRINCE2®, which stands for PProjects IN Controlled Environments, which evolved within the UK government where project owners needed to ensure that they delivered projects on time, to budget and at an agreed quality level.

RACI roles and responsibilities

Imagine you are launching a new advertising campaign using Facebook. Table 12.2 shows an example of how the RACI roles and responsibilities chart might look.

Table 12.2 RACI roles and responsibilities example

Task	Digital Marketing Assistant	Designer	Digital Marketing Manager	Marketing Director
Justification for campaign	A	–	R	C
Target audience definitions	R	C	A	I
Copy for campaign	R	–	C	I
Image options for campaign	A	R	C	I
Campaign execution	R	–	A	–
Campaign monitoring	R	–	I	–
Campaign feedback	R	C	A	I

R = Responsible, A = Accountable, C = Consulted, I = Informed.

Why bother using the RACI or RASCI matrix?

Trust me, this soon becomes clear when working on a project! Here are some reasons why roles should be clarified and agreed, in advance:

- If the roles and responsibilities are unclear, it takes ages to get a decision and no one knows whom to contact and how to get a 'yes' when needed.
- Plus, if the work doesn't go according to plan, it is not clear why or who is responsible.
- Too many people focus on doing the same thing. 'I didn't know you were doing that too!' becomes a common mantra.
- Stuff just doesn't happen: 'I didn't know we needed to do that, oops'.
- It's demoralising: some staff are taking on too many tasks to catch up, others rock up at 9:00am, leave at 5:00pm and take a full hour for lunch, and when they return get the evil eye ...

Think back to the last time you had a group work project. Did it work well? It can be the same in business too. In organisations where projects are assigned, some people do more than others and they use the same excuses you have heard in group work!

Some people say they are doing the work but adopt **cyberdeviant** behaviour (see Ethical Insights: Cyberdeviancy) and use the technology or systems for their own benefit, rather than for the good of the organisation.

Or worse still, a friend (!) picked up your phone and checked your email or Snapchat account when you weren't looking and either signed up for undesirable emails or added inappropriate accounts! Check if you have been hacked with the Digital Tool: Have I been pwned?

Ethical Insights Cyberdeviancy

Technology at work is intended to help the organisation and enable more productive processes. The use of work equipment for other purposes or for aggressive means is called cyberdeviancy. The aim is to either threaten or harm the organisation or its staff (Weatherbee, 2010). Cyberdeviancy involves:

- **Cyberloafing** – constantly looking at your Facebook page, web surfing, or shopping online whilst at work.
- **Cyberaggression** – where individuals point out errors in documents and publicly share the mistake by copying in entire departments, intending to score points and look better than others.
- **Hacking** – this doesn't always refer to finding ways into other computer systems and can involve checking colleagues' emails when they forget to lock their computers! I have known this to happen where people have taken advantage of someone failing to lock their PC and they have signed them up for unpleasant websites and newsletters, thinking it was amusing. What they didn't realise is that most organisations can track dates and times of all actions and check back to see what happened!
- **Cyber whistle-blowing** – possibly revealing secret or company confidential material.

Cyberdeviancy is best avoided, as when discovered it can result in disciplinary action, potential dismissal or legal action! There are several cases of students in the UK and the USA who hacked into their university systems to improve their grades and who destroyed their careers because they were arrested and charged with criminal offences (Espinoza, 2015; Thompson, 2016).

Digital Tool Have I Been Pwned?

In case you are concerned whether your data has been compromised, a Microsoft regional director has created a free website where you can check to see if your email address has been subject to a data breach or has potentially been hacked.

Go to haveibeenpwned.com and add your email address. Has your data been compromised?

And if you are wondering why it's pwned not owned it's because in the myths of computer gaming a designer is said to have mistyped owned as pwned and the meme has continued.

Activity 12.2 Evaluate Roles and Responsibilities with the Raci Matrix

Imagine you are working on a group project for one of your assignments. There are specific tasks required at different times. You all have different roles and are sharing the tasks to save time.

Using Table 12.3 as your framework, note the top seven tasks and identify the roles you will all take. When you have done this, add in the RACI factors to show who will be responsible, accountable, consulted and informed during your project.

See Template online: Evaluate roles and responsibilities with the RACI matrix

12.5 CHOOSING THE RIGHT RESOURCES

Your digital marketing plan may have listed the resources required (see the 9Ms in Chapter 10) and this may be a wishlist for some organisations, including items like: extra staff, new software systems to improve the customer journey, extra training for current staff and more! The issue is whether this is possible. As an example, smaller organisations face greater challenges and may not be able to afford new IT systems or to simply recruit larger numbers of staff as soon as needed.

12.5.1 THE SAF FRAMEWORK

The issue is, how do you assess whether your list of actions or requirements is suitable? UK-based lecturers Gerry Johnson, Kevan Scholes and Richard Whittington wrote a textbook called *Exploring Corporate Strategy* (Johnson et al., 2008) in which they created a framework for justification of actions and strategies, in terms of whether they were suitable, acceptable and feasible. Called the Suitability, Acceptability, Feasibility (SAF) framework, it seeks justification of actions and strategies to see if they demonstrate suitability, acceptability and feasibility in relation to the organisation, its purpose and environment, as shown in Figure 12.4.

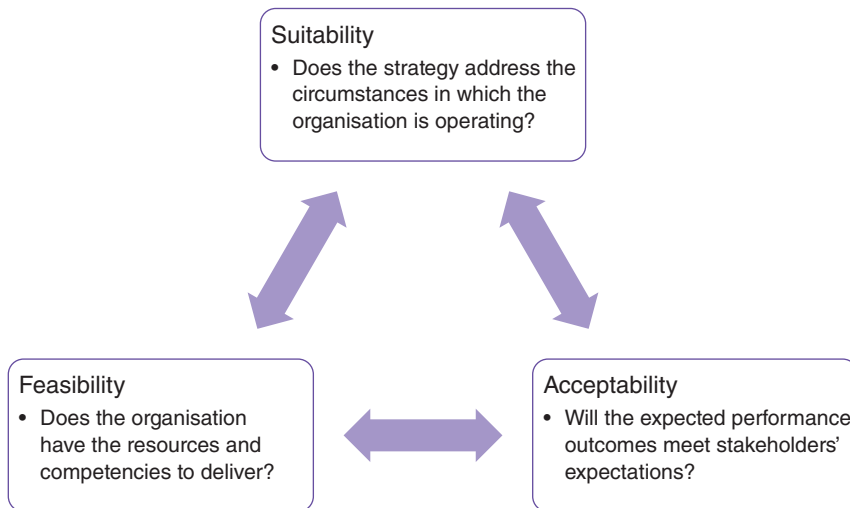


Figure 12.4 The Suitability, Acceptability, Feasibility (SAF) framework

You may already be using the SAF framework! Imagine when you are thinking about a new mobile phone:

- Is the phone battery life *suitable* for long commutes and the three-day festivals you are planning to go to this year?
- Will it be *acceptable* in size, style and brand and considered as OK by friends?
- Is the phone *feasible* in terms of the contract price affordability and will you be able to re-sell at the end of the contract?

These are important factors as buying a mobile phone or taking on a new phone contract may involve a one-off payment or a monthly fee of £10 to £60 depending on the type, the length of contract and other variables. In this case you are justifying your decision to yourself and your bank balance! You process the SAF framework in your head in about five minutes, but when applying this to an organisation, especially where you may have been given a budget, the best approach is to follow the four SAF steps that we will explore here.

Step 1 – Suitability, Acceptability, Feasibility criteria

Justification is the key here. Imagine you have recommended developing a new app for a business. This involves a major investment. If you are working as a digital marketing manager, you are responsible for bigger and costlier decisions and need to address the key considerations, as shown in Table 12.3.

Table 12.3 Key considerations in the SAF framework

Element	Key considerations
Suitability	<ul style="list-style-type: none"> • Will the strategy meet the organisation's objectives? • Does it fit with future trends, environmental opportunities and digital disruption? • Does it exploit the strategic capabilities of the organisation? • Is it sustainable over the long term?
Acceptability	<ul style="list-style-type: none"> • Will the strategy be acceptable to key stakeholders? • Will the strategy meet the expectations of key stakeholders? • Are the expected performance outcomes (e.g. return on investment) acceptable? • Are the associated or potential risks containable?
Feasibility	<ul style="list-style-type: none"> • Can we afford it? • Can the strategy be made to work in practice? • Do we have the resources and competencies to make it happen? • Do we have experience or success in delivering similar strategies in the past?

It's possible that you may not know all the answers and so need to gather more information – that's step 2.

Step 2 – Information sources and analysis

It is worth going back to Chapter 8, Audit Frameworks to ensure your information sources are valid and rigorous!

You probably need to carry out research to justify the investment. This could include a digital marketing audit and analysis of customer behaviour. Another factor is the financial analysis, which needs potential income (based on your proposal) and the costs of development and delivery. The more detail and analysis included, the stronger the recommendation will be.

Step 3 – Ranking/Comparison

You use step 3 when you have several choices and you are not sure which to select, so ideally you compare the options. You might introduce a scoring system

or a yes/no approach. The more yes answers, the more likely that option is to go ahead.

Let's work through an example of how to score different options using SAF. To do this, I have applied a score from 1 to 10, where:

10 = the option fully meets criteria = YES

5 = there are some limitations in meeting the criteria = MAYBE

1 = a significant issue exists in meeting the criteria = NO

I will use Airbnb as my example case. Their current focus is enabling people to rent out spare rooms and properties to others for a few days or longer. Let's step into the future and imagine that they introduce PetBnb so you could take your cat, dog or iguana on holiday with you too. OK, I know it's a bit tenuous, but it's to show how the scoring works!

Table 12.4 works through an adapted version of the SAF framework, where I have scored the option of developing PetBnb.

Table 12.4 SAF framework scoring example applied to PetBnb

SAF framework element	Key considerations	PetBnb score	Comment/Implication
Suitability	Will the strategy meet the organisation's objectives?	10	Represents business growth
	Does it exploit the strategic capabilities of the organisation?	10	Yes, the systems are already in place
	Is it sustainable over the long term?	5	May require an emergent strategy as competition increases
Acceptability	Will the strategy be acceptable to key stakeholders?	10	They will love the idea!
	Are the expected performance outcomes (e.g. return on investment) acceptable?	5	It's been requested and people specify when they don't want to stay in homes with pets, so the reverse could happen too
	Are the associated/potential risks containable?	1	A few risks, may need contingency plans, such as to partner with local vets
Feasibility	Can we afford it?	10	Investment available internally or short-term loan
	Can the strategy be made to work in practice?	5	Short-term partnership required for market knowledge about pets
	Do we have the resources and competencies to make it happen?	10	Experienced project team can be established quickly
	Do we have appropriate experience/success in delivering similar strategies in the past?	10	Skills and systems in place
Total score		76	

I have kept this fairly simple so there are 10 questions to be answered, a maximum of 10 for each response, so the maximum total could be 100. With 76/100, this is an acceptable recommendation. If this had been 30/100 it might be rejected. This takes us to step 4.

Step 4 – Conclusion

If the PetBnb example was assessed against other options such as PartyBnb to rent a party house or WeddingBnb, it is easier to decide which will work best. In the PetBnb example in Table 12.4 this requires some judgement, so more research might be needed!

There is subjectivity in scoring the different elements, so a discussion can be useful if you are working in a team.

Other benefits for scoring the options include:

- Highlights potential limitations or gaps in the organisation's capabilities
- Indicates actions needed to fully meet the criteria which could have been overlooked earlier
- Clarifies the options that best suit the organisation

Don't lose heart if the options seem unattainable! If you have ever had a placement with or worked in a small organisation, you will know that they can't always recruit new staff as needed. One option may be crowdsourcing.

The power of the crowd has spread into online freelance marketplaces which can be useful for organisations needing short-term help, as well as for students seeking project work. Plus there are crowd-based websites that generate ideas, such as 99 designs, Crowdspring, OpenIdeo and websites to raise funds for new ideas (Crowd-cube, Crowd-funder, Kickstarter). You are probably also aware of crowd-selling websites (eBay, Etsy, PeoplePerHour), crowd-support (Quora) and crowd-creation (Wikipedia).

Activity 12.3 Assess Your Options for Crowd-Based Power

Look at a crowdsourcing website (you may need to sign up) and identify if there are any areas where you could contribute: perhaps designing a logo, conducting a digital marketing audit or building a website.

Crowdsourcing has been used by countries worldwide, as Case Example 12.2 shows!

Case Example 12.2 Crowdsourcing for Gold

A smaller gold-mining company from Quebec, Canada, Integra Gold, wanted to identify the best locations on which to focus their resources to identify new gold streams. They had heaps of data – more than 6 terabytes that covered a 75-year history.

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Typically mining companies are extremely secretive but the style of the MD and senior management team was totally different. Instead of paying analysts to examine the data and spend years checking results, they decided to seek help from the crowd.

They launched a crowdsourced competition, sharing the data with all interested parties, with a total prize pot of 1 million Canadian dollars for those presenting the most innovative and creative solutions (Integra Gold, 2015). The aim was to get much faster results and share the reward. This was a totally unheard-of method of working in this sector and heralded a new disruptive style.

The five winners included one firm that already provided this service but they adopted a different approach, using virtual reality to better explore the mines (Market Wired, 2016).

Case Questions

- What do you think about crowdsourcing for a strategic aspect of the business, as in this case example?
- What are the risks involved in sharing data in this way?
- How else would you have solved the issue of analysing years of data?

FURTHER EXERCISES

1. For an organisation of your choice assess its key resources using resource-based theory. These resources may include brand names, in-house knowledge of technology, employment of skilled personnel, trade contacts, machinery, efficient procedures, physical or human processes or intellectual property.
2. For an organisation of your choice, analyse and explain which approach it has adopted for staffing. Compare to a similar organisation and discuss which staffing model for digital is most successful and why.
3. Using the SAF framework, propose amendments to either (a) the way your university or (b) a well-known brand operates.

See Template online: The Suitability Acceptability Feasibility assessment

SUMMARY

This chapter has explored:

- Managing resources which requires a balance of understanding what they are, ensuring their potential has been realised and planning for the future.
- Different digital marketing roles and team formats.
- How to apply the SAF framework to choose the best option.
- How to use RACI when allocating team roles and responsibilities.

13

DIGITAL MARKETING METRICS, ANALYTICS AND REPORTING

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

- Understand** the benefits of metrics in marketing
- Apply** the Plan–Do–Check–Act (PDCA) framework
- Analyse** the Uses and Gratifications theory
- Evaluate** dashboards for marketing
- Create** a marketing dashboard

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Evaluate metrics within an organisation
- Create a dashboard to measure what matters

13.1 INTRODUCTION

Measuring online marketing is the key difference in digital. Every web visitor, every device used and every page viewed can be analysed using onsite and offsite tools. This chapter looks at metrics, from web to social media analytics, from email to SEM and content. The analytics and insights available from a range of online sources form a large picture.

This chapter explores all types of analytics from web to social media, email to content marketing, and to ensure the data isn't shared as a boring report, we will also look at dashboards.

13.2 DIGITAL MARKETING METRICS – WHAT MATTERS?

From an early age everything we do is measured – our birth weight, height, the year we started to walk and talk, then at school there are so many tests to measure our performance: how well we perform in specific subjects, over the whole year and compared to our peers. In the same way, organisations measure performance. Instead of measurements we call these **metrics** (see Key Term), which I could argue sounds more scientific, although as Tim Ambler at the London Business School said, 'a metric is a performance measurement' (Ambler, 2000, p. 61) and is part of the ongoing call for marketers to be more accountable.

Metrics or measurements in isolation may not matter; what does matter is being able to apply the data, which means:

- **Understand the metric** and evaluate the impact, for example how does this compare? How did that work?
- **Provide feedback** and recommend, for example, that this means our campaign worked/failed, the website changes had a positive/negative result.
- **Take action** to improve a situation, for example we should now monitor, adjust, change, add, remove.

13.2.1 PLAN–DO–CHECK–ACT (PDCA)

In the field of quality management the PDCA cycle was created by Walter Shewart and refined by his student Edward Deming (Johnson, 2002). It is a basic circular concept that dates back to the 1920s, but it is still valid and encourages managers to plan what is needed (identify the problem), do something about it (develop solutions), check the results (evaluate the metrics) and act to fix it (make the necessary changes). This section explores the 'check' stage so that you can recommend actions for positive change.

Activity 13.1 Application of the PDCA Cycle

Table 13.1 contains data from Twitter relating to one tweet. The aim of this tweet was to drive traffic to a website, as part of an awareness, consideration, conversion strategy (see Chapter 9, Strategy and Objectives).

You can see there were many impressions but they only converted into 25 link clicks or visits to the website. The tweet contained a static image, one hashtag and one link. Typically from a link click there is a 2% conversion rate for people sharing their data or completing a sale.

- Using the PDCA elements, review and analyse the data. This should identify:
 - What worked and what didn't?
 - What were the percentages from impressions to engagements and link clicks?
- Based on the data analysis, develop solutions, suggest metrics and recommend changes.

Table 13.1 Twitter data

Activity	What this means	Volume
Impressions	How many people saw the tweet	20,192
Total engagements	How many times people interacted with the tweet	1,070
Profile clicks	Number of clicks to Twitter profile	371
Media engagements	Number of clicks on images posted	282
Likes	How many times people liked this tweet	201
Detail expands	Number of times people viewed the details about this tweet	112
Retweets	Number of times people retweeted this tweet	73
Link clicks	Number of times people clicked in a link in this tweet	25
Replies	Number of people that replied to this tweet	11
Hashtag clicks	Number of clicks on a hashtag in this tweet	12

See Template online: Application of the PDCA cycle

KEY TERM METRICS

There are two definitions of metrics which are helpful:

Tim Ambler in Marketing Metrics suggested that a "metric" is a performance measure that top management should review. The term comes from music and implies regularity: the

(Continued)

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reviews should typically take place yearly or half-yearly. A metric is not just another word for measure – while all metrics are measures, not all measures are metrics. Metrics should be necessary, precise, consistent and sufficient for review purposes’ (Ambler, 2000, p. 61).

Paul Farris and his colleagues in their book *Key Marketing Metrics* defined a metric as ‘a measuring system that quantified a trend, dynamic or characteristic’ (Farris et al., 2009, p. 1).

Metrics have evolved as online channels provide greater visibility and more data for marketers. Digital marketing metrics are a way that organisations measure their online performance and Table 13.2 shows a range of measures from traditional to digital. Apart from the change in data accessibility, there has also been a change of attitude with a move away from quantifying negative to positive comments and abandoning the concept of measuring complaints but rather capturing customer satisfaction.

Table 13.2 Metrics from traditional to digital

Metric type	Traditional	Digital
Financials	<ul style="list-style-type: none"> • Sales • Return on investment 	<ul style="list-style-type: none"> • Sales • Return on investment • Conversion rate • Cost per action • Cost per lead • Cost per customer • Customer Lifetime Value
Customer volume	<ul style="list-style-type: none"> • Total number of customers 	<ul style="list-style-type: none"> • Number of views (posts, videos, ads) • Fans, likes, followers
Customer behaviour	<ul style="list-style-type: none"> • Loyalty/retention 	<ul style="list-style-type: none"> • Volume/value of repeat sales • Willingness to recommend
Customer satisfaction	<ul style="list-style-type: none"> • Number of complaints (level of dissatisfaction) 	<ul style="list-style-type: none"> • Net Promoter Score/Customer Satisfaction Index • Sharing, re-tweets • Favourites • Feedback to your business • Comments on the site • Ratings/Reviews • Advocates positively promoting your business
Product quality	<ul style="list-style-type: none"> • Relative perceived quality 	<ul style="list-style-type: none"> • Number of returns • Review scores
Market share	<ul style="list-style-type: none"> • Volume or value 	<ul style="list-style-type: none"> • Number of visitors to owned media
Market growth rate	<ul style="list-style-type: none"> • The percentage at which your market is growing (or declining) offline 	<ul style="list-style-type: none"> • The percentage at which your market is growing (or declining) offline and online
Awareness	<ul style="list-style-type: none"> • Unprompted recall 	<ul style="list-style-type: none"> • Share of voice • Brand sentiment • Talking about you off site
Engagement	<ul style="list-style-type: none"> • Mailing list 	<ul style="list-style-type: none"> • Email subscriptions • Group membership • Downloads • Love/Like this
Distribution/availability	<ul style="list-style-type: none"> • Number of stockists 	<ul style="list-style-type: none"> • Online availability

Metrics, also called analytics and insights, are available within all social media platforms. You can see the numbers of visitors, viewers, followers and more. In addition to the customer volume measures, digital marketing metrics cover specific processes such as web analytics, social media analytics, email analytics, pay per click (PPC) analytics and content analytics, which are covered in the following sections.

With data from diverse sources, you might think that you could look at just one source for all your information. However, there are issues with comparative analysis. You might imagine that the results you get on your Google Analytics dashboard will tally with your Facebook Insights or Twitter Insights, but not so. All collect data at separate time points and use different methods of calculation and there have been many reported errors! (See Ethical Insights: What you see isn't what you get.)

Ethical Insights What You See Isn't What You Get

The numbers matter, as it's how advertisers are charged, so if you are told there have been 1,000 views, you pay for 1,000. But if in fact it's only 600 views you have been overcharged!

Facebook, YouTube and Twitter have all had issues calculating metrics, and one by one they have all apologised for getting the numbers wrong.

- In December 2016 Twitter noticed they had wrongly calculated video viewings after an Android update – they refunded all affected advertisers (Twitter, 2016).
- In January 2017 YouTube apologised as video views suddenly dropped as the company re-calculated how views were counted (Marissa – Community Manager, 2017; YouTube, 2017).
- In May 2017 Facebook reported a bug that 'misattributed some clicks on video carousel ads' (Facebook, 2017).

New standards have been demanded by advertisers and as Thomas Hobbs reported in Marketing Week, 'Marketers becoming "paranoid" over reliability of marketing metrics: Almost three-quarters of senior marketers believe media measurement currencies are becoming "increasingly corrupted" and that players such as Google and Facebook have too much control' (Hobbs, 2017, p. 1).

Metrics or KPIs or OKRs?

Whilst we are talking about metrics, many firms develop and measure Key Performance Indicators (KPIs) and many tech companies consider Objectives and Key Results (OKRs) which are similar to KPIs and include the objective (see Digital Tool: Google OKRs spreadsheet and scorecard).

These KPIs are the agreed metrics they wish to understand. KPIs are often financially focused and Table 13.3 shows the most common financial KPIs and there are many more – if you're interested, visit the library and check out textbooks on financial management!

Table 13.3 Financial KPIs

Financial KPIs	What this means	Example
Sales or revenue	Total income from sales	In 2016 Facebook's revenue was \$27,638 million
Net profit or net income	The amount of money left after all deductions (cost of sales less all operating costs and overheads)	In 2016 Facebook's net income was \$10,217 million or 37%
Gross profit	The amount of money left after all direct sales costs (before operating costs and overheads)	In 2016 Facebook's revenue was \$27,638 million and the cost of revenue was \$3,789 million, therefore the gross profit was \$23,850 or 86%
Return on investment (ROI)	Net profit divided by the investment cost, usually as a percentage $ROI = (\text{Net Profit} / \text{Cost of Investment}) \times 100$	If you invested in Snapchat's shares when the company launched on the stockmarket, you would have paid \$27.09 per share. After 3 months the shares were valued at \$17.77 so you had a negative return on investment

Digital Tool Google OKRs Spreadsheet and Scorecard

Google and others have formed a collaborative team called re:Work and their aim is to share best practice in data-driven management. They have created two downloadable online tools to help build Objectives and Key Results (OKRs). Before diving in, watch the video first, which explains Google's OKRs:

- <https://rework.withgoogle.com/guides/set-goals-with-okrs/steps/watch-googles-OKR-presentation>

Download the spreadsheet and scorecard to measure and track OKRs:

- See <https://rework.withgoogle.com/guides/set-goals-with-okrs/steps/grade-OKRs>

13.2.2 WHAT METRICS MATTER?

There is a question with so many metrics: what really matters? Figure 13.1 shows examples of weak, acceptable and strong metrics. The weak metrics shown here are often called **vanity metrics** (see Key Term). They don't contribute meaningful data, for example on Facebook you may have 100,000 fans, but fewer than 2000 may see your content due to the algorithm (see Chapter 3, The Digital Marketing Toolbox) so the number of fans has no impact on content shared. An organisation may have 50,000 Twitter followers, but if the followers miss a few hours looking at Twitter, they may not see any tweets that have been shared.

These metrics follow the social media framework of awareness, consideration, conversion, discussed in Chapter 9, Strategy and Objectives. The stronger metrics are those that generate conversion actions such as a sale or provision of an email address or other data, to start a one-to-one conversation.



Figure 13.1 Weak, acceptable and strong metrics

KEY TERM VANITY METRICS

Vanity metrics are considered as those that make you look good but have little substance.

Writing in the *Journal of Advertising Research*, Stephen Rappaport (2014, p. 110) commented that numbers such as likes, page views and time on site ‘make people feel good even as they give the impression that digital marketing efforts are paying off, but they don’t answer any number of more pertinent concerns, including the following:

- Why were these metrics reported?
- How do they relate to an objective?
- After data analysis, what remain unanswered?’

13.2.3 HOW DO WE USE THE METRICS?

Having understood which metrics matter most, how can we use them? Table 13.4 shows the strong metrics identified in Figure 13.1, explains who these may be useful for and how they are applied. What’s interesting is that this shows the figures matter for people outside the marketing team and may include community managers,

content creators which may involve external agencies, customer service, finance, general managers, product selectors, sales teams and web developers.

It is wise to relate the metrics being used to the organisation's overall objectives or KPIs as they will be recorded on a formal basis and everyone is using – and hopefully understanding – the same measures.

Table 13.4 Metrics and how to apply them

Metric	Explanation	Who useful for	How to apply
Number of visitors to owned media	Number of visitors to a website, by hour, day, week, month	Content creators	To see if website and other owned media are performing or growing and if not why
Email subscriptions	Number of people signing up for your email newsletter	Content creators, sales	To see if 'email collectors' such as 'subscribe here' are working
Group membership	Number of people joining a group created by the organisation	Community manager	To see if it is worth continuing or adapting the group NOTE: specific group objectives are needed (see Chapter 5, Online Communities)
Downloads	100 people downloaded a 'how to guide'	Content creators	To see how many people downloaded information and if it is worth (a) creating the information and (b) asking for personal data before the download
Ratings/Reviews	Ratings that may be verified or unverified, e.g. rated five stars on TripAdvisor® or product given one star	General managers, product selectors	To understand what is happening with frontline teams, to gauge feedback on products that do/don't work and make changes quicker
Love/Like this	People clicking the ♥ to show their friends they like the item	Marketing, product selectors	To understand trends and if the 'love' becomes a purchase
Brand sentiment	People talking about the brand online	Marketing	To understand brand strength and make changes if needed
Return on investment (ROI)	The investment divided by the resources employed, e.g. if a new website costs £50,000 to develop and generated sales of £180,000 over 12 months, the ROI was £130,000 or 2.6 times	Marketing, finance	To see if the money and resources invested generated the expected return which is a useful way of planning future budgets but a strategic measure which may need consideration after 12 months
Conversion rate	Often a percentage showing the number of people who visited your site and the number who purchased	Marketing, sales, web developers	Small tweaks can make a big difference. If you generate 10,000 visitors to a website with a 2% conversion rate, this is 200 sales, so conversion rate optimisation techniques (see Chapter 14, Integrating, Improving and Transforming Digital Marketing) to increase to 2.5% could generate an extra 50 sales

Metric	Explanation	Who useful for	How to apply
Cost per action	The cost per click, video view	Marketing	To understand how much it costs for each action and whether it is viable
Cost per customer/ cost per acquisition	The cost of acquiring a new customer	Marketing	To understand how much it costs to acquire a customer and whether it is viable
Conversion action (sale, data swap, applicants)	When people complete a conversion, such as buying a product online, sharing their email address, registering to donate	Sales, Marketing	To understand which actions were more successful and adapt other campaigns
Repeat sales (retained, returning customer)	The number of customers that return and make a second and ongoing purchases, or continue to subscribe (rather than unsubscribe) and maintain their donations	Sales, Marketing, Customer service	To see if customer service and the customer journey are working and calculate the customer lifetime value (see Key Term – customer lifetime value)

Case Example 13.1 shows how a business to business (B2B) organisation measures and uses digital marketing metrics.

Case Example 13.1 B2B Digital Marketing Metrics

Amy Staniszewski, a digital marketing specialist working in a business to business environment, shared details about the metrics she uses to measure their B2B marketing campaigns. She explained that the main metrics included engagement and sales volume measures. There are examples here, with why they matter:

- Engagement metrics such as retweets and likes on social media – to understand what content is effective
- Open rates on emails, particularly in A/B testing – to understand which headlines and images work, to inform future campaigns
- Number of Playbook downloads – to see what works and if these convert to webinar bookings
- Number of signups to webinars – to see what topics work and provide leads for the sales team
- Number of attendees for webinars – to see what topics resonate with the audience and provide leads for the sales team after the webinar
- Number of people who drop out from webinars – to understand why the engagement wasn't completed and inform future timing of online events
- Number of leads created – to measure how many convert to sales and monitor conversion rate

Case Questions

- What other metrics would be beneficial for the company?
- What is the best way to report these metrics?

Customer lifetime value

A concept that is measured is **customer lifetime value (CLV)**, which was first mooted by F. Robert Dwyer followed by a description by Gordon A. Wyner (Wyner, 1996; Dwyer, 1997). The factors in CLV are:

- Establish the relevant universe – who are the actual and potential sources of revenue
- Develop measures of components of value – this is customer revenue and cost over time
- Determine overall customer value – from the probability of being acquired, the expected annual expenditures and the expected lifetime of the customer

KEY TERM CUSTOMER LIFETIME VALUE

The notion of customer lifetime value (CLV, also labelled LTV) is part of the concept of relationship marketing.

Rather than a one-off sale, the idea is that there is an ongoing relationship where the company provides useful products or services wanted by the customer who makes repeat purchases. Instead of calculating the initial order value, the whole of life value is calculated.

As an example, men's grooming has become popular. To look good, chins need maintenance and it is easy to sign up to a regular pack with companies like Dollar Shave Club (see <https://uk.dollarshaveclub.com>), which charges £5 for its starter set and then £8 a month for standard razor cartridges.

If we imagine that a man stays beard-free for 3 years, that would mean possibly a 35-month arrangement, which is £285, yet the initial cost is £5. If you add the trial kit set at £5 and a few more items from the grooming kit every quarter, it could take the customer lifetime value to £300.

According to Musfiq Mannan Choudhury and Paul Harrigan there is a hierarchy of customer value (Choudhury and Harrigan, 2014):

- Customer lifetime value (CLV): Present value of future profits generated from a customer over their lifetime
- Customer referral value (CRV): Referrals generated by the customer
- Customer influence value (CIV): Value of customers influencing and sharing product and brand knowledge
- Customer knowledge value (CKV): The value of customers with expert knowledge about a product or brand who help other customers

The change from a traditional measure of lifetime value to knowledge value represents the influence of digital marketing where individual customers can become advisors and experts. Interestingly in an online environment Dipak Jain and Siddhartha Singh observed that ‘the cost of acquiring a customer is higher on the Internet, and profitability from a customer can only come if that customer makes many repeat purchases’ (Jain and Singh, 2002, p. 35).

Another consideration is understanding where the sale came from in the first place, which we will explore next.

Multi-touch attribution modelling

Beware! There are challenges with metrics as they don’t always tell the right story ...

You might think that an advert on Facebook was the reason for the sale, but perhaps it was the email? Or was it the search results? Added to this, the customer might have searched online for the item at work and continued the search when they arrived home, on a different device!

The issue is about attributing the source of the sale, so that marketers know where to invest their resources. This is one of the greatest difficulties for digital marketers. In an online world there are multiple touchpoints and this is referred to as **multi-touch attribution modelling** or attribution. It was defined by Google, for two reasons: (a) an advanced analytics package was needed to see the touchpoints; and (b) this originally referred to results from paid search adverts (see Key Term), although we could say this considers the customer’s entire path to purchase (see discussion of the customer journey in Chapter 2).

Chris Anderson and Ming Cheng conducted research into attribution modelling and stylised a customer search, as shown in Figure 13.2. This demonstrated how a customer might purchase immediately, but also might not.

Attribution modelling will continue to grow so that marketers can better understand how sales were generated, although the analytics packages that provide greater insight tend to be aimed at enterprise level. The standard packages require time and effort to add in all potential channels.

KEY TERM MULTI-TOUCH ATTRIBUTION MODELLING

An attribution model is the rule, or set of rules, that determines how credit for sales and conversions is assigned to touchpoints in conversion paths. For example, the Last Interaction model in Analytics assigns 100% credit to the final touchpoints (i.e., clicks) that immediately precede sales or conversions. In contrast, the First Interaction model assigns 100% credit to touchpoints that initiate conversion paths. (Google, 2018, p. 1)

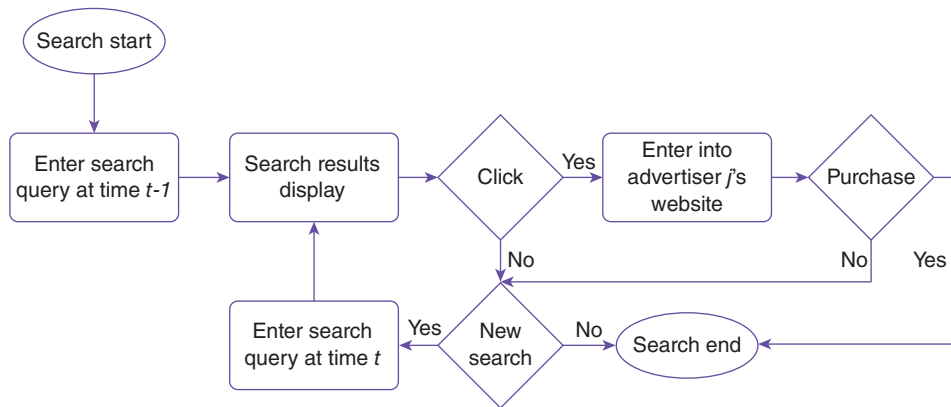


Figure 13.2 Flowchart of customer search loop

Source: Anderson and Cheng, 2017, p. 255 *Cornell Hospitality Quarterly*

DISCOVER MORE ON MULTI-TOUCH ATTRIBUTION MODELLING

'The path to purchase and attribution modeling: Introduction to special section' by P.K. Kannan, Werner Reinartz and Peter Verhoef, published in the *International Journal of Research in Marketing*, provides a useful background (Kannan et al., 2016).

The next sections explore different metrics based on specific digital channels.

13.3 WEB ANALYTICS

Web analytics can be described as the assessment of a variety of data, including web traffic, web-based transactions, web server performance, usability studies, user-submitted information and related sources to help create a generalised understanding of the online visitor experience. The official Web Analytics Association definition of web analytics is 'the measurement, collection, analysis and reporting of Internet data for the purposes of understanding and optimizing Web usage' (Web Analytics Association, 2008, p. 3).

Web analytics come in two forms; *onsite* and *offsite analytics*. Onsite analytics measure actual visitors to the page and this is based on access to the data, i.e. you control or manage the website and can look at the detail. Offsite analytics do not require access to the data. Based on aggregated data from companies like Google, offsite analytics

measure potential web audience numbers and show how your website compares to others. These tools are often freely available with some limited data.

There are two major methods for gathering information for this web analytics: **web server log files** (see Key Term) and **page tagging** (see Key Term)

KEY TERM WEB SERVER LOG FILES

Web server log files or web log files is a record (log) of every action (hit) on a website. This includes a visit to the site, clicking on specific items and the steps through the website. The web log file is created and is available to the website administrator. They can see the visitor behaviour but will not always know who the visitor is.

There are challenges with cookies because they can be rejected or blocked or removed. Sometimes the cookies time out before a page loads, especially when it is a slow loading page – busy visitors may click off the page before it loads fully. Other challenges include the page tagging not reporting on non-pages such as PDFs or downloaded files, so the data may not be accurate.

KEY TERM PAGE TAGGING

Page tagging is adding tags to web pages; these tags are better known as adding cookies when visitors arrive at a web page.

See also Key Term – **cookie**, p. 42.

Web analytics include a range of metrics, as shown in Table 13.5.

Table 13.5 Web analytic data elements

Web analytic element	Data available
Site usage/audience	<ul style="list-style-type: none"> • How many visitors came to the site • How frequently they visited • Geographic data • Some demographic data • Technical data; browser, device type • Path through the website (visitor funnel)

(Continued)

Table 13.5 (Continued)

Web analytic element	Data available
Site content	<ul style="list-style-type: none"> • Top entry pages • Top exit pages (where shopping carts were abandoned) • Top performing pages • Least performing pages • Length of visit (duration and bounce rate)
Visitor sources	<ul style="list-style-type: none"> • Where the visitors came from • Percentage of visitors from social networks • Some data on the search terms to arrive at the site
Quality assurance	<ul style="list-style-type: none"> • Broken pages • Site speed

The best-known web analytics program is probably Google Analytics. People always say this is free, which it is at one level, although in exchange for the free service, Google captures and uses your data. So, whilst it may be without charge, Google benefits from knowing about your data.

There are companies that opt for the paid-for version, so they control and manage their own data. For example, financial institutions often don't want to share their data with Google, so whilst they use the program, they pay to store and retain their own data. For a fully customised Google Analytics package the fees start at around £100,000 a year.

Digital Tool Google Analytics Academy

Google is keen for students to learn more about analytics and has created a series of free, online workshops. Visit the link below to start exploring!

- <https://analytics.google.com/analytics/academy>

To get started you add a tag to your website which allows Google to share data with the web team. Some of the Google Analytics terminology includes:

- **Users:** Visitors to the website.
- **Sessions:** The period of time a user is active on your site and if they are inactive for 30 minutes or more (say they pop for lunch and leave the web browser open) this is counted as a new session.
- **Page view:** A webpage being loaded (or reloaded) in a browser. Page view is a metric that means the total number of pages viewed.

- **Bounce rate:** A bounce is a single-page session on a website. Typically, a single-page session lasts less than one whole second! It often occurs when someone visits a website by mistake.
- **Session duration:** The average time a user (visitor) spends on your site – it is a basic measure as it is simply total visitor numbers divided by the total time on the site.
- **Conversion:** A completed activity, online or offline, such as buying a product online, downloading a white paper or clicking the ‘live chat now’ button.
- **Attribution:** The process of assigning credit for conversions to touchpoints in the customer journey.
- **Tag:** A snippet of code (JavaScript) that sends information to a third party, such as Google. The Google Analytics tracking code or Facebook pixel are examples of tags.

Activity 13.2 Create Your Own Analytics Data

1. Start a blog!
2. Use free blogging tools such as Wordpress or Blogger and create some posts about your digital marketing experience. Ideally posts should contain at least 350 words – that’s less than a page of A4 – so that Google can see and index the posts.
3. Add some copyright-free images and credit the image source.
4. Share the blog posts across social media to encourage people to read your content.
5. The blog will provide access to basic analytics and give you an appreciation of how this works. To gain access, after a month review the data in the analytics section of the blog. You can see:
 - Numbers of visitors
 - Which posts were more successful.

13.3.1 BENEFITS OF WEB ANALYTICS

Web analytics has become a job role in its own right and can help information professionals use tested keywords to achieve their SEO (search engine optimisation) aims. (For discussion of SEO see Chapter 3, The Digital Toolbox.) It can change the way organisations approach paid search, leading them to focus less on expensive keyword bidding (Google Ads), and this information can be used to fine-tune the website, to provide visitors with more useful content and to improve navigation through the site.

Web addresses for specific campaigns can be constructed in such a way, using **UTM parameters** (see Key Term – **Urchin tracking module (UTM) parameters**), that

marketers can analyse exactly which aspects of a campaign were most successful. For the first time you can tell which ads worked and which ads didn't.

13.3.2 THE DOWNSIDE OF WEB ANALYTICS

The downside is **big data** (see Chapter 1, The Digital Marketing Landscape). There is such a volume of information that it's difficult to know where to start and what to consider when looking at an analytics page. You could get lost in a sea of data and spend so much time looking, that you don't discover what's really needed.

The data changes in real time, so as soon as you have a clear picture, the situation changes. This speed of data change or its velocity is a challenge and it means agreeing when the data is collected to ensure consistency.

And some years ago Google started protecting the searcher by encrypting some data and not revealing the keywords or key phrases searchers used to find your website. This means that you look at a Google Analytics page and the top keyword shown is 'not provided'. This is likely to increase as more web browsers protect their visitors by not providing the search terms.

There's also a real variety in the data and in accessing the data. If you are using the free version of Google Analytics, the company occasionally changes where and how information is accessed.

KEY TERM URCHIN TRACKING MODULE (UTM) PARAMETERS

One feature that Google retained when it purchased Urchin analytics was their Urchin tracking module parameters or UTMs. Google described UTMs as custom campaign parameters for advertising URLs (Google, 2017). These custom parameters (or elements) are added to a web address so that marketers can identify which website, advertising method, campaign, search terms and content type worked.

All five parameters must be used and Figure 13.3 shows an example of a web address that contains these five UTMs.

The main benefit of using UTM parameters is that marketers can better attribute how the sale or other conversion activity took place.

13.4 SOCIAL MEDIA ANALYTICS

At one level we have web analytics, which provide data about web visitors, and the next level of data is within your social media pages.

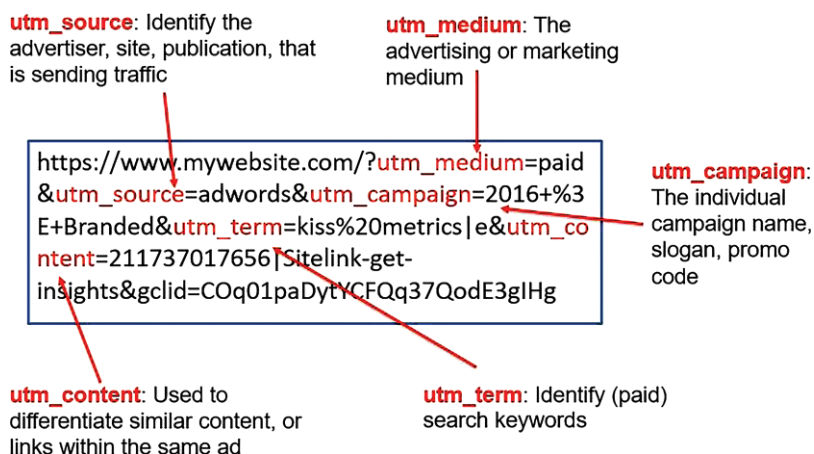


Figure 13.3 Example of web address using UTMs

As social media pages have visitors, they also gather data on their behaviour. This enables the social media companies to sell advertising space to organisations as they have rich details on which Facebook pages are popular, which YouTube channels are most watched and which interests are visible on Twitter.

Initially social media channels were reluctant to share this data and it is only after many requests that insights have become available. Whilst there are some benefits with social media analytics, they are not without challenges. The advantages of social media analytics are that they provide a useful overview of how content is performing and you can see the engagement (retweets, link clicks, likes, replies) on different content types. The disadvantages of social media analytics are that they lack depth and detail; the data often doesn't tally with other analytics programs and the focus can be on promoting successful posts.

To counteract challenges with big data, the social media platforms typically limit the analytical information available, which is why it lacks depth and detail.

Two key measures in social media are (a) daily active users (DAUs) and (b) monthly active users (MAUs). Sometimes you also hear of WAUs – weekly active users. Facebook, Twitter, Pinterest, WhatsApp and Snapchat all measure DAUs and MAUs – the details are often included in the reports to shareholders as an indicator of growth. The difference between DAUs and MAUs is engagement. Daily active users visit the sites daily whereas monthly users could be said to be less active. Table 13.6 shows the main terminology used in social media analytics.

Table 13.6 Social media analytics terminology

Expression	What this means
Reach/Impressions	How many people were shown the post
Engagements/Actions on page	Total number of times a user interacted with a post or page: clicks, shares, replies, follows, likes, links
Engagement rate	Number of engagements divided by impressions

(Continued)

Table 13.6 (Continued)

Expression	What this means
Likes, fans, follows	Times a user followed you
Clicks	Number of clicks on the page, post, profile, hashtag, links, attached media
Reactions	Number of people reacting to, commenting on and sharing your posts (like, retweet, share)

These expressions are often used as the social media metrics; although it doesn't always matter how many people were reached, it matters how many people clicked on the link to your website and completed a conversion action!

13.4.1 FACEBOOK DATA

Facebook was initially slow to provide data, which they call *insights*. Typically, in a business to business environment users are online during the week, not at the weekend, and an example of this is shown in Figure 13.4. This is fondly referred to as the Facebook whale, as the shape never seems to change!

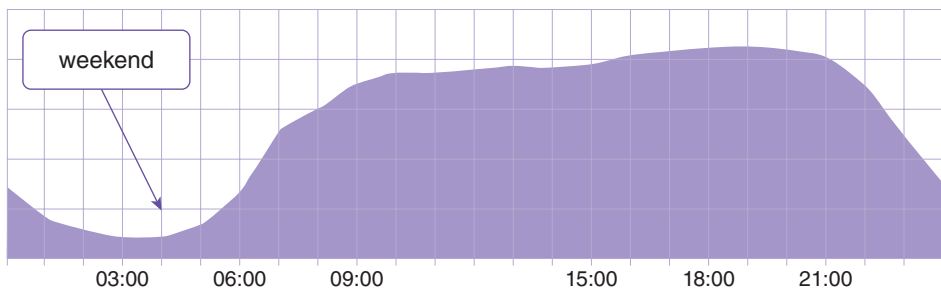


Figure 13.4 When Facebook users are on site for a business to business organisation

What Figure 13.4 provides for marketing managers, is an indication of when to add content. The dip shows when the weekend happens, so for these companies the optimum time to share content is after Monday morning.

In Chapter 3 I explained why social media advertising is used and the challenge for organisations is that Facebook shows very little organic content to people who have liked the page. Another issue is that people generally respond to more **vivid** and **interactive** content (for more on vividness and interactivity see Chapter 4, Content Marketing). Typically, photos gain greater reach than videos and regular links fare badly. This informs social media managers and content managers as to what is needed on the page – what works.

13.4.2 TWITTER DATA

Twitter's analytics are similar to those of Facebook and focus on numbers of views (impressions), such as:

- Impressions: The number of times the tweet appears in a timeline.
- Engagement: The number of times users interacted with tweets, clicked, retweeted, liked or checked your profile.
- Tweet performance: How many times people viewed and interacted with a specific tweet.
- Engagement rate: The number of engagements divided by impressions, shown as a percentage.

Like web analytics, there is onsite and offsite data in social media. Onsite data is only available to page administrators. Offsite data is generally available through commercial providers. If you are a researcher, you may have access to programs like QSR Nvivo which allow you to copy and paste data from websites and social media pages – this is known as data scraping, data mining or text mining.

Twitter has different functionality from other social media channels. It has an open application programming interface (API) which means that developers can access the system. As a result, there has been much research conducted into Twitter and to capture Twitter data, I have used a data-mining tool called twDocs (see www.twdocs.com). This provides access to up to 3200 tweets per session, that can be downloaded for analysis. The raw meta data can be imported into Excel (and other statistical packages) and includes an array of data such as the organisation name, date and time tweet created, tweet content, retweet count, favourite count, link to the tweet, time zone/location and the Twitter software used.

As social media pages include 'regular users to celebrities, politicians, company representatives comprising of different social and interests groups' (Su and Chen, 2016, p. 393), you can access their data for research or other purposes by simply using a data-mining tool. You don't even get a notification when your data is downloaded, as any Twitter account that is publicly available can be mined! Plus you can explore your Twitter data without the need for any software. You log in to your Twitter account, go to settings and privacy and request your archive. When it arrives you can open it in Excel to look at it in more detail!

13.5 EMAIL ANALYTICS

In the past, direct mail revolved around the use of letters sent by post. The challenge was that you didn't know if they had reached the intended recipient, whether they opened or simply binned the letter, and the only way of knowing if they took direct action as a result of receiving the letter was to include some form of code that could be redeemed against a purchase and checked later – sometimes months and months afterwards!

With email it is so different. As Antun Bilos and his fellow researchers from Croatia noted, 'accurately measuring achieved results of any given email marketing campaign

can help companies understand and improve the marketing activities they conduct in order to ultimately reach their business goals' (Bilos et al., 2016, p. 97).

Detailed email tracking and measurement are only available if you use an email software system, sometimes called an email delivery system. If you send a batch email to say 1000 people, direct from your Google or Outlook accounts, it might look like it's a spam attack. The internet service providers (ISPs) like BT, Sky and Virgin may decide to block the emails so that they are not delivered at all. And again, if they are delivered, you don't know who has opened the email or clicked on links unless you have requested read receipts and created dedicated landing pages.

Using an email software system such as campaignmonitor.com, emailit.co or mailchimp.com, allows you to gain more accurate data as to who has looked at what and when. Plus, it facilitates better management of the data as people can automatically subscribe or unsubscribe to your mailings.

Analytics provided through email software include a large amount of data in terms of who received the email and the action they took as a result. Table 13.7 shows the type of email analytics data available.

Table 13.7 Email analytics data available

Data provided	What this means
Total recipients	Total number of people that the email was sent to
Successful deliveries	The total number that the email actually got through to
Bounces	The number of people (a) whose mailbox is full – this is a soft bounce – or (b) who have left the organisation or deleted the email account – this is a hard bounce
Times forwarded	How many times the email was forwarded to others
Forwarded opens	How many of those who received the forwarded email opened it
Recipients who opened	The details (email addresses) of the people who received the email and opened it
Total opens	The number of people who received the email and opened it
Last open date	The last time the email was opened – this indicates the 'shelf life' of an email communication
Recipients who clicked	The details (email addresses) of the people who received the email, opened it and clicked on one of the links in the email
Total clicks	The total number of clicks
Last click date	The last time someone clicks – this often happens when someone thinks 'I saw that recently' then they search through their emails to find the link to click
Total unsubscribers	The number of people who unsubscribed following this email
Total abuse complaints	The number of people who reported this as spam – too many of these and you won't be able to send any emails

Email software systems provide summary reports that show the number of successful and unsuccessful deliveries, whether the email was forwarded and the number of unsubscribers. These systems can include integration with social media so that newsletters, offers or other information can be shared across social media platforms at the same time. There is also research into why email works (see Figure 3.3 Why email works, on p. 58).

There are options to test and review the data to see what worked within email software delivery systems. One popular option is A/B testing, which has long been available as a concept in traditional marketing. In the email software systems you can create headline A and headline B, issue both newsletters and the systems will send headline A to 10% of the audience and headline B to another 10% of the audience. Based on your definition of success, whether that's number of opens, click-throughs or other conversation mechanism, the system will automatically send the most successful email to the remaining 80%.

DISCOVER MORE ON EMAIL MARKETING AUTOMATION

Apoorv Durga, a marketing analyst, has created a useful, two-page 'Guide to email marketing and marketing automation tools', published in *EContent* (Durga, 2015).

Although it's a few years older, the article 'Web advertising: The role of e-mail marketing' by Fiona Ellis-Chadwick and Neil Doherty is useful as a framework for what works (Ellis-Chadwick and Doherty, 2012).

13.6 SEARCH ENGINE MARKETING AND PPC ANALYTICS

Search engine marketing (SEM), pay per click (PPC) or search advertising analytics allow you to see the results from paid adverts when visitors are searching online (see Chapter 3). The different SEM metrics that are used include:

- Clicks: The number of people who clicked on the ad and then to your website.
- Impressions: The number of people who were shown your ad.
- Average CPC: The average cost per click.
- CTR: The number of people who click on your ad from the number of people who saw your ad. For example, the ad was shown to 1000 people and 100 clicked on the ad, so that's a 10% CTR.
- Conversions: The number of people who took an action (sign up, downloads, form submissions app download, newsletter registration, enquiry form completed, live chat session, customer feedback, ratings, reviews, contact us).
- Conversion rate: The percentage of people visiting your site and completing a conversion action.
- Cost per conversion: The cost per conversion action.

Like Google Analytics, Google Ads provides campaign overviews that show the clicks, impressions and average CPC in one page. And whilst we mainly refer to Google Ads because it is the leading channel, there are alternatives, including:

- Bing Ads
- Yahoo
- Amazon
- Directories such as TripAdvisor®, Yelp
- Social media ads such as Facebook, LinkedIn, Twitter, Pinterest, Snapchat (see the previous section on social media analytics)

Google has set the benchmark and most online advertisers follow their systems as this is where most people learned how to use SEM. And they have made it easy, as reporting on SEM and PPC metrics often takes place automatically. You set up your reports and run when needed!

Case Example 13.2 Bidding on Competitors' Trade Names

Interflora® is a flower delivery network that allows you to call one florist and get flowers delivered by another in the network. They have agreed flower ranges and set processes, which are methods of guaranteeing brand consistency. Interflora® is also a registered trademark and in May 2008 UK retailer Marks & Spencer used Google Adwords to bid on the word 'Interflora'.

Understandably the team at Interflora® were very unhappy and legally challenged Marks & Spencer in court for infringement of their trademark. Interflora® argued that the adverts misled the public (they could be tricked into thinking that Interflora® flowers were available from Marks & Spencer), it increased the price of the advertising as a bidding war started and it damaged their brand. A five-year battle took place and Interflora® finally won the court case at the European Court of Justice.

Generally in the UK we avoid tactics of naming competitors in adverts and this had applied to bidding for ads online. We tend to think that this is unacceptable behaviour even though it is common practice in countries like the United States.

Two points to note from this:

- Firstly, if you are working somewhere and the organisation is being challenged by competitors, it is wise to gain formal trademark registration to protect brand assets, especially in a world-wide online environment. This is probably better managed through a trademark specialist as there are no worldwide trademarks – you need to register in specific locations, such as the UK, Europe, the United States and Japan.
- Secondly, if you are on a placement year and, as you are the digital marketing person, they ask you to bid on a competitor's brand or name, think carefully – it could all end in court!

Case Questions

- If working on placement, how would you manage a request from a manager to bid on a competitor's name?
- What other options might be available?

13.7 CONTENT ANALYTICS

Content analytics considers qualitative as well as quantitative factors. Qualitative measures include analysing key words in the text as well as the sentiment or the feeling of the person communicating the message. Quantitative measures of content are also known as glottometrics, which include word length, word order, richness of vocabulary and word frequency. Beyond glottometrics, other quantitative measures for content include: the volume of terms mentioned, the reach of the message (how far it spread) and the number of clicks on links, photos, videos or other material.

If you are exploring an organisation's use of social media, you might also consider the message type, which may include: brand awareness; product awareness; customer service; engagement; corporate social responsibility; promotional or seasonal messages (Coursaris et al., 2016).

You may wish to measure paid media, owned, shared media or earned media (see Chapter 4, Content Marketing).

Smartphone Sixty Seconds® – Instant Engagement Metrics Score

Likealyzer is a free content metrics overview tool from the analytics reporting company Meltwater. You can use this to gain an overview of how well (or how badly) content on Facebook pages works.

1. On your mobile phone log in to Facebook.
2. Go to <https://likealyzer.com>.
3. Add in the name of your favourite shop's Facebook page (or somewhere you may be working).
4. What are the results for the response and engagement metrics?
5. How do these compare with others in class?
6. What are the recommendations for improvement?

13.8 REPORTING THE DATA

When you have captured your data, it is time to consider reporting. From an early age everything we do is reported: school reports, subject performance reports and end of year reports. These reports are often attached to performance or grades which are entered into a report that is shared. It's no different at work. When you carry out any marketing activity it has to be measured, monitored and reported, regardless of the organisation type. For example:

- Companies with shareholders have to create and share annual reports, interim reports, statistics, presentations, press releases and other knowledge-based information.

- Universities create and share their strategy for people, education, research and innovation, the corporate plan, financial review and results.
- Charities create and share their annual report and accounts, strategic plans and policies.

All this information requires knowledge and data. It can be too late if you reach the end of the year and start to gather the data because:

- The organisation may have performed worse than expected.
- There may be issues that have been missed.
- They may have outperformed competitors.
- Urgent actions may be required due to the results of some data.

Think about your university grades and how you might wait until the end of the year before realising action is needed. This is why it is critical to collect the data on an ongoing basis, to anticipate requirements in the organisation and take the necessary action as soon as possible.

Options for reporting are varied and depend upon (a) legal requirements for a meeting; (b) audience type; (c) time available to organise; (d) amount of detail to share; and (e) required action after the meeting. There are variations in reporting formats, from those that need to take place in person or where either written or visual material will be needed, as well as the type of written or visual material that will be needed to support the data delivery.

Although the report design depends on the audience to be addressed, the most frequently used internal data delivery system has become the dashboard. According to researchers Ginger Killian and Kristy McManus, 'Social media dashboards can enhance the impact of content posted on a given platform and provide metrics to compare effectiveness across platforms' (Killian and McManus, 2015, p. 547). Dashboards are often internal visualisation systems to see how key metrics are performing, at a glance. This data can subsequently be embedded into other report formats. Let's explore dashboards further.

13.8.1 HOW AND WHERE DASHBOARDS ARE USED

KEY TERM MARKETING DASHBOARD

Koen Pauwels and colleagues defined the marketing dashboard as 'a relatively small collection of interconnected key performance metrics and underlying performance drivers that reflects both short- and long-term interests to be viewed in common throughout the organization' (Pauwels et al., 2008, p. 7).

In all types of vehicles, from motorbikes and cars, from boats to aircraft, dashboards have been a common feature. They let you know the amount of fuel, your speed and indicate if there are any issues such as lack of oil or light bulbs have failed. In recent years dashboards have become more sophisticated and often include average fuel consumption, outdoor temperature and elapsed journey time. The purpose of these functions is to inform and make you aware, so that you can re-fill with fuel before running out, slow down in traffic and ensure the vehicle is maintained. Dashboards are visual information systems enabling users to immediately see the overall situation.

In situations where there is an urgent or critical need to see key information quickly, dashboards can literally save lives. They are popular in hospitals and medical facilities for this reason and are used in many other different situations, including airports, stock markets, call centres and retail goods stores.

Dashboards have further evolved in digital environments, and if you use a smart band or watch, you are wearing your health dashboard which tracks your activity level, breathing rate and even your sleep cycle!

The reason for their popularity in marketing was summed up by Koen Pauwels and colleagues who stated: 'Dashboards respond to the increasing complexity and diversity of market data faced by senior management in the information age' (Pauwels et al., 2009, p. 176). If you think back to the concept of big data and the many different types of metrics we explored earlier in this chapter, you might start to agree that a dashboard provides the essentials for busy marketing managers.

13.8.2 EVALUATION OF DASHBOARDS

Dashboards are not without flaws and whilst they have many benefits, there are disadvantages too. Advantages of dashboards include: a consistent set of metrics, which is useful for comparable analysis and enables teams to measure agreed actions and activities. You can see trends and make changes faster. Plus, dashboards save time by gathering all information in one place and there is faster reporting as the focus is on the key metrics. Two critical factors are that dashboards enable teams to focus on what matters and can help set goals.

Disadvantages of dashboards include: they might display smaller amounts of data and mislead the overall picture. There can be a tendency to focus on the numbers (what) rather than reasons (why) and they may provide a simplistic overview rather than the in-depth detail that may be needed. Plus they can become a support system rather than an enabler.

The critical factor is ensuring the dashboards are not just watched, but action is taken and discussions about the content take place too. Looking at this we can see that the Plan-Do-Check-Act (PDCA) cycle (see section 13.1 above) starts to become more important.

Michael Krush, from North Dakota State University, and several colleagues reviewed the use of dashboards for business and concluded that they were relevant to the management team and their value was the ability to increase the speed of implementing strategy (Krush et al., 2016). The question is, what's needed in a dashboard?

Executive Overview

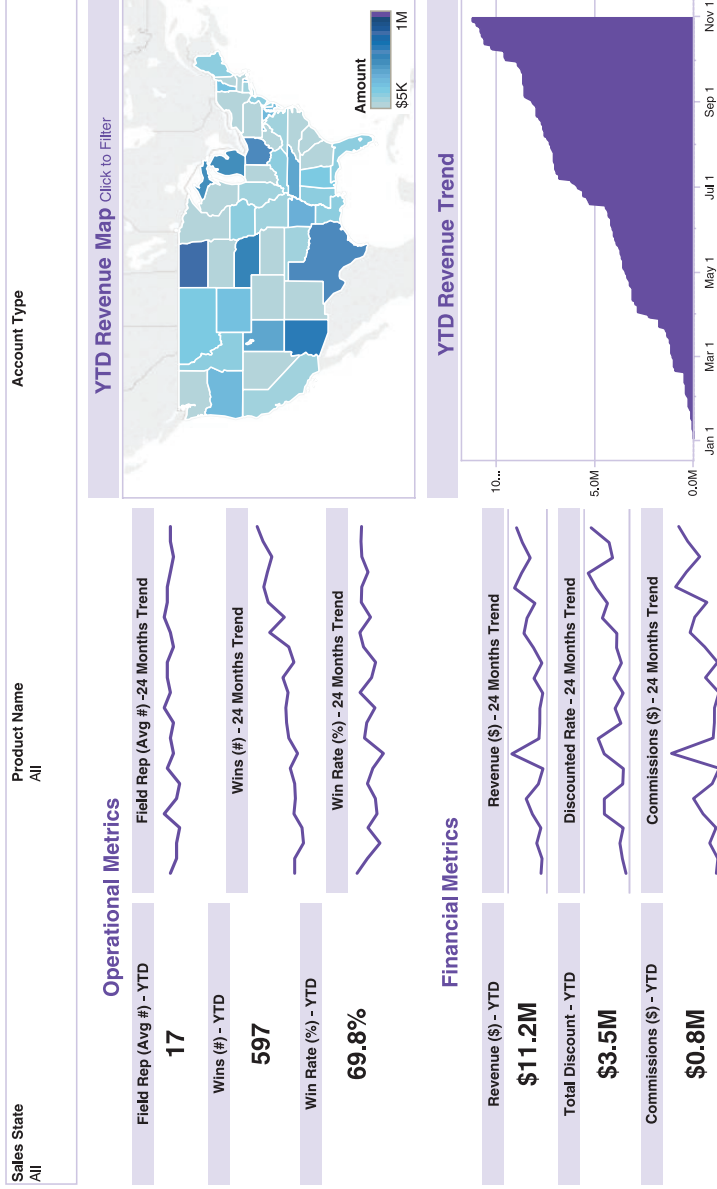


Figure 13.5 Strategic dashboard

Source: Tableau software: www.tableau.com/learn/whitepapers/6-best-practices-for-effective-dashboards?ref=lp&signin=42c2d707760051e6226ae67dc2f59abf®-delay=TRUE

13.8.3 CREATING A DIGITAL DASHBOARD

When creating a dashboard you need to consider the essentials:

- What type of dashboard is needed?
- Who is the audience?
- Where is the data?

In terms of type of marketing dashboards, there are three main options:

- Strategic: Focusing on larger organisational goals such as total monthly sales value, number of customers that month
- Tactical or project focus: Showing status of campaign with details such as conversion rates, number of shares, email marketing results, adwords performance
- Operational: Aiming at specific business activities such as number of outstanding responses, number of orders to despatch

As an example, Figure 13.5 shows a strategic dashboard aimed at executives which focuses on the performance of the sales team and the sales results.

Factors to consider when creating a dashboard

When creating dashboards, you need to consider the audience and their requirements. Senior executives may require specific data. Marketing teams may be more interested in the granular detail of how content is performing.

Where the data is located can be a challenge; you don't want to create the task for yourself of trying to pull data from many sources. This is why so many commercial systems have evolved – all the data is pulled into one location. It is important that the data is accessible and integrated. Koen Pauwels and his colleagues recommended that dashboards should be integrated on three levels (Pauwels et al., 2008):

- Integration of data – taking and combining data from diverse sources
- Integration of processes – relating inputs and outputs
- Integration of viewpoints – enabling different teams to share and see the same data

Building a dashboard

Having agreed the audience, the source of the data and the type of dashboard, the next step is confirming what data is needed. This data contributes to the success of the dashboard and must include the metrics required by the team.

Having considered, discussed and agreed the metrics it's time to build your database. You can do this in spreadsheet programs like Excel or Sheets, but it will take some time. It is easier to obtain marketing software to trial how it works.

Commercial software has grown dramatically and Table 13.8 shows some popular options. Some have a free function with limited detail and many include a trial version. In terms of budgeting, most are paid for on a per user, per month, licence basis.

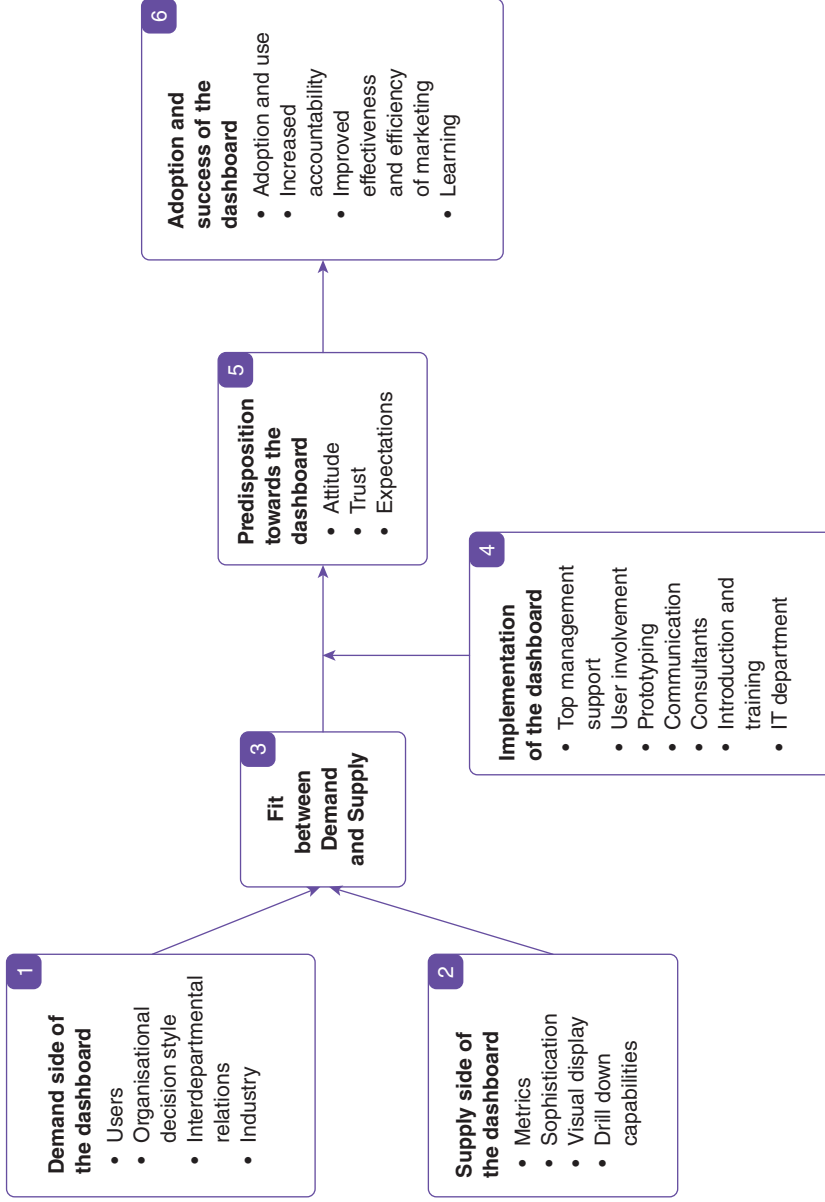


Figure 13.6 Framework for the adoption and success of dashboards

Source: Pauwels et al., 2009, p. 183. Adapted from Wierenga, Van Bruggen, and Staelin (1999). *Journal of Service Research*

Table 13.8 Management and dashboard systems

Company	Web address	Free version available
Crimson Hexagon	crimsonhexagon.com	
Cyfe	cyfe.com	Yes
Dash	thedash.com	Yes
Freeboard	freeboard.io	Yes
Hootsuite	hootsuite.com	Yes
Hubspot.com	hubspot.com	
Infusionsoft	infusionsoft.com	
Sysmos	sysomos.com	
Qlik	qlik.com	Yes
Tableau	tableau.com	
Zoho.com	zoho.com	Yes

Most of these systems are available online and can be used at any time from any device. The key is identifying the metrics that matter!

Introduction of the dashboard

Introducing any new software is fraught with difficulties and it is therefore important that the introduction of a dashboard is successful. In another research project, Koen Pauwels and colleagues proposed a framework for the adoption and success of dashboards, shown in Figure 13.6. This starts by considering the demand side (1), who wants and will use the dashboard. The next factor is the dashboard functionality (2), followed by joining up the demand and supply sides (3). The next step is implementation and getting different people involved and testing before a launch through the use of prototypes (4). Psychological factors follow, with how users feel about the idea of a dashboard (5), and finally its adoption and success (6). These last factors resemble elements of the Technology Acceptance Model (see Chapter 2).

If these steps are not followed and a dashboard simply imposed on a team it will be less likely to work, resulting in another failed software investment!

FURTHER EXERCISES

1. For an organisation of your choice evaluate the current metrics used. Identify why the metrics were selected and why they are used.
2. For an organisation of your choice create a dashboard that illustrates the metrics that matter.
3. For an organisation of your choice recommend metrics to measure customer acquisition and retention. Consider what the chosen organisation needs to measure and any benefits or drawbacks of carrying out this measure.

SUMMARY

This chapter has explored:

- How to use the Plan–Do–Check–Act (PDCA) cycle to ensure you are using the right metrics.
- The move from traditional to digital metrics.
- What metrics matter, with examples of weak, acceptable and strong metrics.
- Web analytics, with the key Google terminology.
- The potential metrics in social media, email and content.
- Benefits of types of reporting, with examples of how dashboards can help.

14

INTEGRATING, IMPROVING AND TRANSFORMING DIGITAL MARKETING

LEARNING OUTCOMES

When you have read this chapter, you will be able to:

Understand integrated marketing communications to digital marketing

Apply the IMC framework

Analyse elements of competitiveness

Evaluate the impact of cross-platform integration

Create the 9 steps to digital transformation

PROFESSIONAL SKILLS

When you have worked through this chapter, you should be able to:

- Use heatmapping tools
- Perform website usability analysis
- Create a plan for digital transformation

14.1 INTRODUCTION

Once metrics have been considered, the next stage is improving aspects of digital marketing. This chapter shows the factors involved in these elements and adds to the theory as well as showing you the different marketing models around integration and how to assess digital skills within an organisation.

The last part of the chapter explores digital transformation and the steps required. If you cannot move beyond step 1, the project is unlikely to succeed. If you do progress through the steps, you will learn more about the path to superior firm performance, taking the organisation into an entirely different league.

14.2 INTEGRATING ONLINE AND OFFLINE

Having considered different aspects of digital marketing, it is time to join up and connect with traditional marketing practices. Some organisations separate teams into digital and marketing rather than embracing a holistic approach across the firm, which I will discuss around the concepts of digital transformation.

Digital marketing has a direct impact on **integrated marketing communications (IMC)** (see Key Term) as the customer controls the brand rather than the company. Customers can write about every aspect of their brand experience – from how the website works, the shopping process, and of course, any complaints are shared online. Customers discuss and comment about the convenience of the deliveries available and then as the package arrives, they record the ‘unboxing’ process to share with their own audience. This is often followed by a review of further feedback at a later stage. All customers are now influencers and, as mentioned in Chapter 2, one organisation that recognised this is Adidas which created specialised and exclusive content for their micro-influencers (The Tango Squad) to partially retain control and better understand where their brand is being discussed.

KEY TERM INTEGRATED MARKETING COMMUNICATIONS (IMC)

For the definition of IMC I have looked at the specialist journal the International Journal of Integrated Marketing Communications, and the review undertaken in 2009 which looked at

the main descriptions and argued the case to use the explanation proposed by the same author in 2008:

IMC is an audience-driven business process of strategically managing stakeholders, content, channels, and results of brand communication programs. (Kliatchko, 2009, p. 9)

When running campaigns we know that we need a range of communications methods to have a greater impact and at the same time we need to ensure the messages don't clash with each other and create **cognitive dissonance** (see Key Term – cognitive dissonance, p. 266). This is about ensuring the **advertising appeals** are integrated, regardless of platform (see Key Term – advertising appeals in Chapter 11). We are aware that communications focus on appeals to the audience which usually fall into two areas: emotional and rational. Table 14.1 shows more details with examples of where they are used.

Table 14.1 Message appeals applied to digital marketing

Appeal type	Explanation	Examples
Emotional: Value-expressive or symbolic appeal	<ul style="list-style-type: none"> • Building a 'personality' for the product • Creating an image of the product user 	<ul style="list-style-type: none"> • Clothing brands portraying their users across social media • Influencers such as Lucy and Lydia use emotional appeal to engage their audience. They sell a lifestyle and have created their own brand
Rational: Utilitarian (functional) appeal	<ul style="list-style-type: none"> • Focusing on key benefits • Highly functional, factual • Informational advertising 	<ul style="list-style-type: none"> • Sports goods focusing on functionality in online ads • YouTube education videos that focus on 'how to'

Integration of traditional and digital marketing activities is essential to ensure an organisation presents a clear, credible and consistent plan to its target audience. But it's not just about integrating the marketing activities, it's about combining or joining up or incorporating all aspects of marketing into the business unit.

Integrated marketing communications or IMC is just one element of marketing to be addressed. It's the most popular as it's often responsible for the most externally visible outputs, such as communications and campaigns.

Whilst the definition of IMC revolved around brand communication programmes, the newer definition included the notion of *content* as a pillar of IMC (Kliatchko, 2009). This aptly named article, 'IMC 20 years after: A second look at IMC definitions', discussed how content is ubiquitous (available anywhere, at any time), can be collaborative and recipients can also be the content creators. It's difficult to integrate content from your customers, although not impossible (see Case Example 14.1).

Case Example 14.1 Vanish 'Tip Exchange'

The worldwide consumer goods company Reckitt Benckiser uses customers as the heroes with one of its products, Vanish stain remover. The company encourages and integrates user-generated content through the YouTube 'Tip Exchange', where real-life customers post advice to other consumers about how to remove stains from clothing.

Users submit their video via Facebook or a dedicated country website such as www.vanish.co.uk/tip-exchange in the UK; there are other sites for Germany, France and Spain. Some light touch editing takes place by Reckitt Benckiser, who add the brand logo in the corner of the video, as shown in Figure 14.1. These ads are used across multiple channels: TV, YouTube and magazines.



Figure 14.1 Vanish Tip Exchange example

Case Questions

- Those submitting videos gain the thanks of a grateful audience, some products as a reward, but no formal payment. What do you think of the ethics of companies benefiting from user-generated content?
- Why do you think the user-generated content works within IMC?
- Imagine that you are a brand manager for a consumer product such as washing powder. How could you better integrate advertising using digital marketing?

14.3 THE 7CS OF IMC AND A CONCEPTUAL FRAMEWORK

Writing in the *Journal of Marketing*, Professors Rajeev Batra and Kevin Lane Keller reviewed earlier research into IMC and noted how marketing has evolved from initial

methods of mass market communication via broadcast TV advertising to a ‘much richer array of communications possibilities’ and more personalised communications using social media (Batra and Keller, 2016, p. 122).

Whilst they initially included consistency and the ability to deliver the same key messages, regardless of platform, this was not included within the final model, as they stated that the recognised recurrence of the concept of consistency throughout all aspects of communications and wider integration had been sufficiently researched.

Their research highlighted seven factors within integration, which, as is usual in marketing, is an alliterative model and is shown in Table 14.2.

Table 14.2 The 7Cs of integration

Element	Explanation
1. Coverage	The percentage or proportion of target audience reached by the communication
2. Cost	Working to the best value and testing options to maximise the budget
3. Contribution	The impact of the communication and the results generated for the organisation
4. Commonality	The degree to which different options share the same meaning
5. Complementarity	The extent to which the organisation delivers the same messages across platforms and harnesses the platform’s strengths and weaknesses
6. Cross-effects	Using different communications options that interact and bring synergy
7. Conformability	How well a specific communication option works for a specific target audience and how it conforms to the needs of that consumer group

The 7Cs of integration is a useful checklist when retrospectively reviewing an online campaign. You wouldn’t know how many people were reached until the campaign started and the impact wouldn’t be clear until the end. This framework is useful as a benchmark to compare different digital marketing campaigns.

Professors Batra and Keller remarked how research into IMC has tended to be focused in certain areas, probably due to the researchers’ own interests or knowledge. They placed IMC within the customer journey (see Chapter 2 for examples of customer journeys) and also noted that traditional models such as AIDA are no longer adequate for the complex paths to purchase customers take in today’s digital environment. They suggested that communication goals should include several stages, as shown in Figure 14.2.

Some of these goals are fairly traditional, such as (1) *create awareness*, (4) *build trust*, (5) *elicit emotions* and (6) *inspire action*.

To *instil loyalty* (7) is a big request, especially in a digital environment where product pricing is transparent and where consumers may experience **flow** when using social media, discover and subsequently purchase an alternative product, perhaps unintentionally (for more on the flow construct see Chapter 7). It is widely recognised that brand loyalty is valued by brands due to repeat purchasing power.

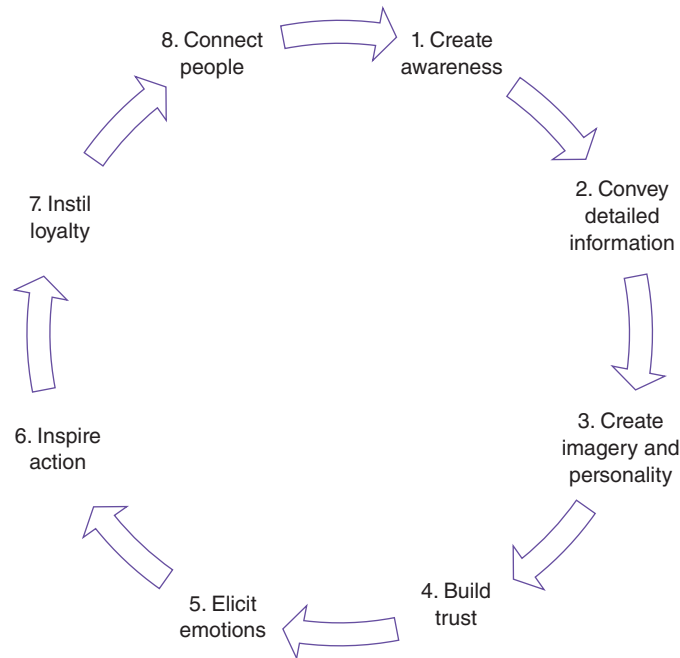


Figure 14.2 Communication goals

Source: Adapted from Batra and Keller, 2016, pp. 131–2

Researchers Ana Margarida Gamboa and Helena Martins Goncalves explored customer loyalty through social networks, using the fashion store Zara and their Facebook page as examples (Gamboa and Goncalves, 2014). They concluded that loyalty online was driven by customer satisfaction. We know that online satisfaction is often achieved via the speed of response (Istanbuluoglu, 2017), so perhaps item (7) *instil loyalty* should be ‘drive customer satisfaction with speedy responses’.

To *connect people* (8) is facilitated by digital environments where consumers can ask questions, answered by other consumers – this is typically how customer support on Apple products works. In a business to business environment connecting people is normal, as it is when buying major purchases such as a house, car or other high-value item, which requires the purchasers to be present and greater connection with sellers to take place.

In other objectives, Batra and Keller have blended, or mixed, emotional and rational appeals such as (2) *convey detailed information*, which is a rational or functional appeal and is situated next to a partly emotional appeal, (3) to *create imagery and personality*. The key here is that some of these goals may be relevant or irrelevant at different times for different campaigns.

Figure 14.2 should be considered as a framework, rather than a rigid model to follow, step by step. It should be adapted based on the organisation type, the message platform and the audience. For example, it is difficult to get emotional about a

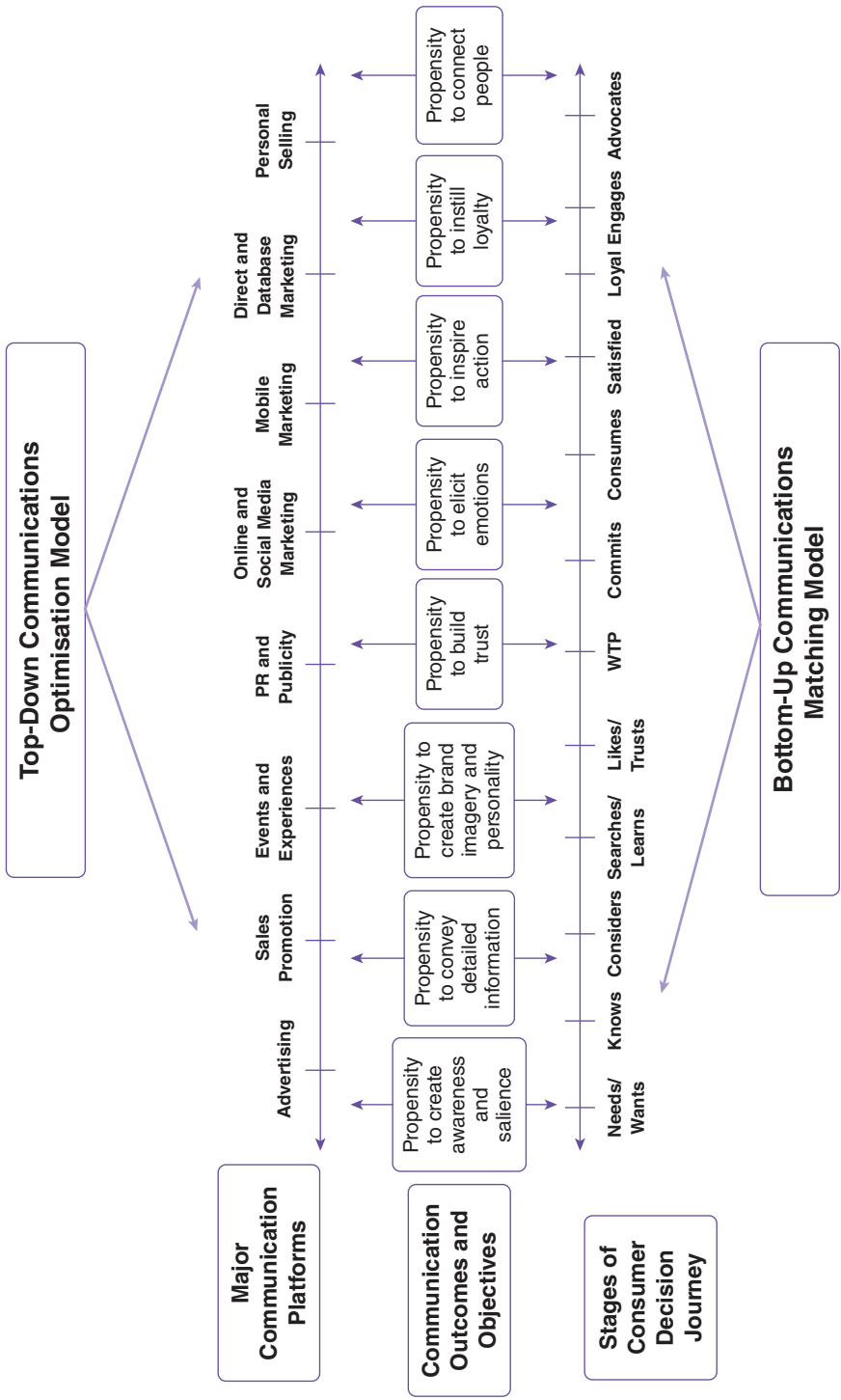


Figure 14.3 IMC conceptual framework

Source: Batra and Keller, 2016, p. 137 *Journal of Marketing*

government service such as the passport office. It is needed but may not be loved, and loyalty does not feature as there may be no choice.

Based on these goals, as an overarching theme, Batra and Keller created a conceptual framework for IMC, which is shown in Figure 14.3. This considered the major communication platforms, the communication outcomes and objectives as well as the stage of the consumer decision journey. This is a useful integrated framework and, again, some elements may or may not be relevant to the organisation.

This conceptual framework is in three parts, with major communication platforms at the top level, the stages of consumer decision journey at the bottom and the communications outcomes and objectives in the middle.

As an integrated model, the major communication platforms encompass both traditional and digital communications.

Advertising, which could be online or offline, is seen as playing a role at the start to create brand awareness. Sales promotion, which includes vouchers, offers and trials, could be a clever way to convey detailed information and the platforms used will vary, as it is difficult to contain significant amounts of information in, say, a Facebook ad or a Twitter post, but it could contain enough to take the target audience to a landing page where more information is available.

The next element, events and experiences, can be more complex for smaller organisations and it is worth remembering that in their examples the professors looked at major car brands, which clearly have major budgets.

PR and publicity can take place both online and offline and is still a mechanism to build trust. Again, using major car brands as the example, they probably engaged PR companies as well as having in-house teams, so this may not be possible for smaller organisations that may need to adopt a self-service approach to online PR, creating their own news stories and posting to various blogs.

Online and social media is positioned as a method to generate emotions, followed closely by mobile, to generate action. This very much depends on how the mobile marketing takes place (see Chapter 6) and how the consumer receives this. The final stages are direct and database marketing to instil loyalty or some form of response, which we could describe as retention.

The model concludes with personal selling in order to connect people. I am not sure that personal selling could be scaled in a digital environment. For example, imagine that you have 50,000 online customers. Would they all need a personal visit?

On the lower level in Figure 14.3, the stages of the consumer decision journey (see Chapter 2, The Digital Consumer) move through the usual problem recognition, to trust and willingness to pay (WTP), then towards the commitment or purchase, satisfaction and advocacy.

The IMC conceptual framework shown in Figure 14.3 is a useful blueprint to capture all aspects of marketing communications within an organisation and ensure it is all connected. Although application to organisations may need adapting based on its nature and size, this framework is a practical checklist to confirm that all elements of the customer journey are captured.

14.3.1 CONSISTENCY

Consistency is a core theme within marketing integration, and it means ensuring the service or offer, the message and any promotions are consistent, regardless of channel. When constructing a mission or vision statement, there should be consistency. Changing company direction on a regular basis confuses staff, customers and other stakeholders.

In 1995 Amazon created its vision statement as ‘to be Earth’s most customer-centric company, where customers can find and discover anything they might want to buy online, and endeavors to offer its customers the lowest possible prices’ (Amazon Inc., 2017). Amazon started with a bold vision as they weren’t aiming for customers located only in their home country of the United States, but across the globe. It wasn’t just about books – their initial product offer – this was about anything a customer might want online. This vision still holds true today and has remained consistent for over 20 years.

14.3.2 COMPETITIVENESS

Being competitive means having an advantage that is difficult for competitors to copy.

Researchers Varun Grover and Rajiv Kohli explored hyper-competitive conditions and suggested there were three aspects within competitive value (Grover and Kohli, 2013, p. 656): (a) software; (b) processes; and (c) information.

- Competitiveness from software:
 - The world’s largest taxi firm, Uber, doesn’t own a single vehicle – they have clever software that matches drivers to passengers.
 - The world’s largest accommodation agency, Airbnb, doesn’t own a single hotel room – they have clever software that matches hosts to guests.
- Competitiveness from processes:
 - The world’s largest retailer, Amazon, doesn’t own a single product – they have clever processes that match buyers to sellers, facilitate easy purchasing with the one-click to buy now and encourage customers to pay in advance for delivery with Prime. This results in customers using the platform for all shopping requirements.
- Competitiveness from information:
 - One of the world’s largest social networks, Facebook, helps sellers specify exact buyer types based on user profiles and behaviour – their source information.

Grover and Kohli’s work was based on creating digital business strategies and mashing up aspects of the business to identify where the opportunities existed, which may include sharing aspects of the business processes, which in the past was unheard of.

The challenge with competitive advantage is described by the Dutch university teacher Anne-Madeleine Kranzbühler and her colleagues as potentially ‘marginal, subject to change and open to imitation’ (Kranzbühler et al., 2018, p. 433), which is why organisations need a clear purpose to become and remain successful.

14.4 THE 4CS OF CROSS-PLATFORM INTEGRATION

The 4Cs of marketing communications is a valuable framework for assessing the integration of campaigns as well as considering the organisational vision, and in marketing – as you may have discovered – we are fond of alliterative models. Another 4Cs, focused on cross-platform integration, is suggested by Dr Ginger Killian and Dr Kristy McManus, who described the need for Consistency, Customization, Commitment and Caution, which were centred around integration across marketing channels (Killian and McManus, 2015) and are shown in Table 14.3.

Table 14.3 The 4Cs of cross-platform integration

Element	How this is applied
1. Consistency	All actions must be consistent across all channels, for example the same brand personality should be visible and discernible in all channels
2. Customization	Social media can be used to customise campaign messages and the brand must understand which channels are being used and for what purposes. The brand might use Instagram for a specific audience and newsletters for another
3. Commitment	When selecting new social media channels, brands need to be clear about their purpose and commit to adopting and using the channel which means frequent content and communication and ensuring there is a connection between the channels and the brand’s goals
4. Caution	Organisations are often cautious about fully integrating all aspects of social media, such as building in reviews and enabling customer comments to be heard on their sites. A policy is needed to understand how and when responses are provided, as well as the tone of voice used when replying to comments, compliments and complaints

Activity 14.1 Assessment of the 4Cs of Cross-Platform Integration

- Using Table 14.3 as a framework, select a brand of your choice and assess how the organisation applies the 4Cs of cross-platform integration.
- Look at various sources, from their website to social media, as well as searching for the brand name with ‘+ complaint’ or ‘+ fail’ in the search terms. This should provide you with information about the brand from the organisation, its customers and unhappy customers too.
- You should note the level of integration across the channels to see if it is consistent, customised on different channels, whether the brand is committed to regular content and responses and if the tone of voice used in complaining situations echoes the rest of the content or adopts a different tone.

Once a plan has been created, data has been gathered and you are seeing that improvements are taking place, it's time to consider specific actions to improve digital marketing.

14.5 IMPROVE DIGITAL MARKETING TACTICS

The thread that connects or integrates all aspects of marketing is the customer journey and it seems logical that as an initial step to improving tactics we might decide to conduct user journey analysis.

Norwegian researchers Ragnhild Halvorsrud, Knut Kvale and Asbjørn Følstad (2016) explored customer journey analysis (CJA) procedures and identified five phases. Considering their approach as similar to taking on a project, they started with phase 1: overview and scope, agreeing the reasons why the analysis was needed; what had happened and who would be involved. It may be that it is only one aspect of a website that will be explored, or if social shopping, just one channel.

In phase 2 they mapped out what was believed to be the planned journey. This can often be discovered by those who created the website as they may have been given this information at the start. A linear customer journey, which is simplistic but plausible, may include: step 1 reads social media post; step 2 visits website; step 3 explores products; step 4 makes purchase; and step 5 writes online review.

Phase 3 starts to involve customers and data. Tools that can help with this include:

- Review of web analytics data to see where customers entered and abandoned the website, which pages were viewed and which were ignored and these issues are covered in Chapter 13, Marketing Metrics, Analytics and Reporting.
- Online surveys to ask why customers didn't buy from you today.
- Live chat analysis to read the conversations and see where customers dropped out of the user journey.
- **Heatmaps** (see Key Term) which show where on the web page visitors are clicking, and equally what they're ignoring!
- **Usability analysis** (see Key Term) to see how well the website does or doesn't work.

KEY TERM HEATMAPS

Heatmaps visualise where someone looks on a web page with colours graded from looking here a lot (red) to glanced at this section (blue). Researchers Mariusz Trojanowski and Jacek Kułak provided a useful definition of heatmaps as 'graphical representation of data with colors,

(Continued)

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showing which part of the page is scanned by the user most frequently and different metrics such as bounce rate' (Trojanowski and Kułak, 2017, p. 110). Figure 14.4 shows an example of a heatmap.

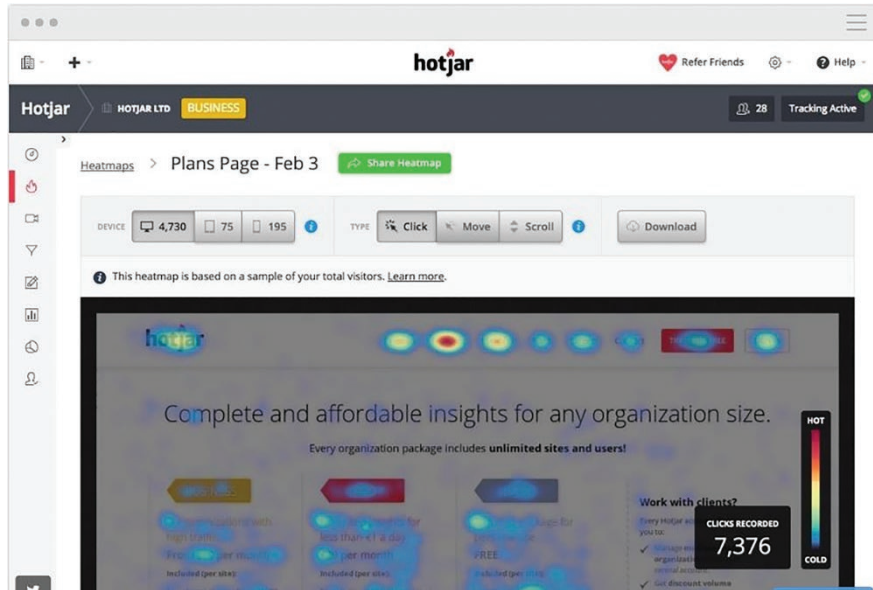


Figure 14.4 Example heatmap

Source: Hotjar.com

Digital Tool Heatmaps

Explore these heatmapping tools:

- hotjar.com
- heatmap.it

As an alternative, Openheatmap allows you to upload Excel or other spreadsheet data that contains location information to create your own heatmap. You can visit the site and use the sample data they provide to see how it works:

www.openheatmap.com

KEY TERM USABILITY ANALYSIS

Usability analysis considers how well a website does or doesn't work. Writing in the *Journal of Computer Information Systems*, researchers James Cappel and Zhenyu Huang discussed how web usability concerned 'the importance of clarity, simplicity, and consistency in web design so that users can perform desired operations efficiently and effectively' (Cappel and Huang, 2007, p. 117). Although this article was published over a decade ago, it is still valid and described all aspects of web usability, many of which we take for granted today, such as a site search facility.

DISCOVER MORE ON USABILITY ANALYSIS

Dr Jakob Nielsen registered many patents on ease of website usage. He was one of the pioneers who explored the concept of usability.

To discover more, read his book *Designing Web Usability* and visit his website, www.nngroup.com, which includes more depth on usability (Nielsen, 1999, 2012).

Digital Tool Usability Tools

A US government website is dedicated to usability. See www.usability.gov for a glossary and details about the benefits as well as key issues when designing a website.

Whilst heat mapping, usability analysis and analysing the data can provide some answers and can tell you what has happened, it may not be able to explain why. As an example, Figure 14.5 shows an actual customer journey, based on looking at the analytics and seeing the funnel or path customers took once in the website.

It is more likely customers will need to be involved to acquire additional qualitative data to understand *why* specific actions were taken. Halvorsrud and his colleagues recommended that customers kept diaries, which may not be practical or possible in some cases, so you may decide to use online chat and surveys as alternatives. For example, one way of doing this is to gain volunteers at university, book a computer lab and ask them to perform a task on a website, such as buying a specific product. They are monitored performing the specific task and all steps are noted. The downside is that the test group may bear no resemblance to the actual users, in which case the findings could be erroneous.

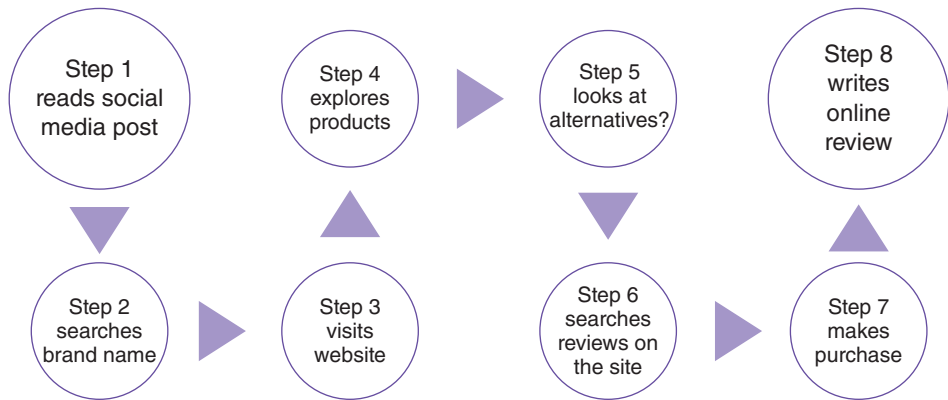


Figure 14.5 Actual customer journey

The final phase is capturing all the data and summarising it into a report for those involved in phase 1. This also provides a benchmark from which the organisation can measure future customer journey analysis.

14.6 IMPROVE DIGITAL CAPABILITIES

Whilst you may be at university learning digital marketing skills, there are many non-trained and traditionally trained marketers. This means that there may be an argument to upskill existing teams.

Across Europe there are efforts to improve digital capabilities. One driving factor in the UK is the government's strategy 'digital by default' (Cabinet Office, 2012), requiring citizens and businesses living and operating in the UK, where practical, to request and file all information online.

14.7 DIGITAL TRANSFORMATION

Digital transformation is the process of moving an organisation from a traditional marketing focus to one that embraces digital business. This does not mean the organisation ceases any traditional activities, but instead focuses on the activities that most closely meet the customers' requirements.

There have been several examples of well-known and long-established companies that ignored the move to digital and subsequently failed. How many of the companies in Table 14.4 still exist on the high street?

At the same time, there have been companies that have embraced digital marketing, usually after an incident, and succeeded (see Case Example 14.2 JetBlue becomes the digital hero).

Table 14.4 Companies failing to adopt digital business

Failed business	Digital disrupter that precipitated the failure
Blockbuster, the video chain. The idea was that you visited the store and collected your video. Do you still have a VHS machine?	Netflix – an idea that developed when one of the team was fined for returning a video too late. Netflix has evolved over time
Kodak films and cameras. How many in your class own a real camera?	The rise of digital photography and smartphone cameras
Comet, the electrical retailer selling electrical goods in store	The growth in online shopping and price comparison sites

Smartphone Sixty Seconds® – Seeking Disrupters

Using your mobile phones:

- Search for ‘disruptive brands’
- Pick one disruptive brand
- In which sector are they based?
- Which companies will they most disrupt or damage in the next 12 months?
- Share findings with classmates.

Case Example 14.2 Jetblue Becomes the Digital Hero

JetBlue has a mixed history within social media. It had major difficulties one Valentine’s Day, when passengers were stranded on a plane for nine hours whilst de-icing equipment was sought.

This was the moment the company adopted digital marketing and its CEO publicly apologised via YouTube. After this event the firm developed its own bill of rights and automatically provides details of compensation (Kaplan and Haenlein, 2011) and uses Twitter as a customer service platform, allowing staff to display personality and use humour. The transformation that’s taken place is demonstrated by the language in these tweet responses:

@NAME Bummer! We’re hoping it is back on soon!

@NAME We love you back ☐

@NAME Glad to hear someone is liking it! ☐ ☐

Case Questions

- Consider a time when you complained via social media. How did the organisation respond?
- Were there any surprises in terms of the tone of voice used, or the format of the response?
- What organisations can you identify which have transformed their business via digital marketing?

The key to digital transformation is leadership. The CEO or MD has to want to make the change. If they don't want to make the change or if they won't support the actions, it's very unlikely that it will succeed.

Writing in *Strategy and Leadership*, Saul Berman, who has explored the subject of digital transformation for some years, suggested three main approaches (Berman, 2014, p. 18):

1. Focusing on customer value propositions.
2. Transforming the operating model.
3. Combining those two approaches by simultaneously transforming the customer value proposition and organizing operations for delivery.

Berman discussed ways to 'enhance, extend and redefine' the customer value proposition which may involve providing additional features online that may be free or chargeable, as well as reviewing the core business offer (Berman, 2014, p. 19). He recommended that the approach taken depends on the industry, the competitors as well as the product and service offer. None of this is surprising, but look back at Table 14.4 and reflect on those companies that ignored all the warnings, saying it would never happen in their sector ...

DISCOVER MORE ON DIGITAL TRANSFORMATION

Read the full article by Saul Berman, 'Digital transformation: Opportunities to create new business models', in the journal *Strategy and Leadership* (2014). Although published a few years ago, it is still valid.

14.8 INTRODUCING DIGITAL INTO THE BUSINESS

As a university student and later as a graduate in digital marketing you may be given a role to introduce digital tools into the business. It is often the case that younger, newer staff are given responsibility for social media in different formats, especially if you have a digital marketing qualification. You may also be asked to help introduce digital working practices into the business and to encourage others to use social media. The challenge you will face is that whilst being given an interesting project, you may not have all the authority to make this happen, so you will need to adopt influencing skills. Part of this may involve using the Technology Acceptance Model (see Chapter 2) to better understand where roadblocks may occur. You may also need to introduce a social media policy or at least raise awareness of what could happen (see Digital Tool: Social media policy maker in Chapter 11).

14.8.1 THE 9 STEPS TO DIGITAL TRANSFORMATION

The issue is, how do you start the process? The critical factor is to start with evidence and to involve others in the process. The 9 steps to digital transformation are:

1. Find the advocate
2. Create an online customer journey
3. Construct the customer experience
4. Map the digital toolbox
5. Review content assets
6. Identify community support
7. Identify the strategic options
8. Create a strategy
9. Pause and present the strategy

Step 1 – Find the advocate

When embarking on any new project, to get commitment for future actions and also to ensure it is successful, you need an advocate, supporter or project champion. This is often a senior person who might be in the marketing department, but they might not be. It is important that the advocate has some authority or power and is able to persuade or influence others.

For example, if one of the drivers for the project is about cost saving, find the finance director, as he or she may have a vested interest and may be willing to support the project.

In not-for-profit businesses, one of the trustees may be willing to help. There may be a well-respected trustee who could be shown the potential benefits or who may be recommending this course of action. Check the minutes of recent meetings to identify the advocate.

If you don't have the advocate, it can be difficult later in the project. You might also ask others in the organisation 'who would be interested in this type of project?' and they may be able to make useful suggestions.

Step 2 – Create an online customer journey

When the advocate has been identified, you need to ensure that you have evidence to support future recommendations. A useful mechanism for this is to start with the online **customer journey** (see Chapter 2, The Digital Consumer).

But don't do this alone! Involve others in the organisation and ask if they could help and do the same. Gather these together and compare the journeys. In an ideal world, get those who helped into the same room at the same time and from this create a

single agreed journey. At this stage you have included other team members, and as they have contributed some content they have a greater interest in how this will be used.

At the same time you should create a customer journey for the top two or three competitors. This can often be the lever that makes things happen as there is a need to stay up to date with, or ahead of, the competition.

Step 3 – Construct the customer experience

Using the customer journey as your foundation, the next step is to construct the customer experience from start to finish. This helps to identify other partners that may need to be involved in the process of digital transformation. It also allows you to make contact and gain their opinions too.

Step 4 – Map the digital toolbox

It is worthwhile looking at the current activities and how they apply to the customer journey. Some may be relevant, some less so. Mapping all items in the toolbox provides an indication of where the organisation is right now. It is a useful snapshot to see the digital tools that are or are not used.

Work through Activity 14.2 to apply the digital and traditional marketing tools to the customer journey.

Activity 14.2 Construction of the Integrated Customer Journey

For an organisation of your choice, select one action (e.g. making a purchase, registering for a webinar, downloading a report). From this construct all stages of the customer journey and identify the different tools used at the different steps in the journey.

When this has been completed, make recommendations to better integrate the customer journey.

Step 5 – Review content assets

One of the fears when working on digital transformation is that all current working practices will be ignored or removed. One of the factors you will have noticed throughout this book is that content will be required at every step of the journey. Organisations often have vast content assets, yet they don't realise what's there. It's important to review the current content as a useful way to understand what the organisation has available when making future plans. Look back at Chapter 4 (section 4.6) and conduct a **content audit** to identify what is available.

Step 6 – Identify community support

Online communities can talk about organisations, their products and services, as well as generating new ideas. It is also a useful lever to positively encourage organisations to adopt elements of social media which they may have previously ignored. I remember working on a digital project and an organisation advised me that they had no need for Facebook and their customers would never use it. I had to explain that they already had nine separate Facebook pages, being run by brand advocates who sadly couldn't use Photoshop and had wrecked their logo! Their options at that time were to continue to blissfully ignore these pages, or to create an official page and ensure the brand advocates were aware of and mentioned this on their pages. We could also provide the advocates with properly sized logos so the online brand image met the brand standard. I am glad to say they decided to create an official page and today they have over one million fans online.

Review whether the company has any online communities, whether formal or informal, and if yes, identify where they are located as this is a great story to share with the organisation: 'We may not be online, but our customers are, perhaps we should join the party?'

Step 7 – Identify the strategic options

The organisation needs to understand where digital fits into the business. In an ideal world it is simply part of the business, but at this stage it may be a new idea. Let's imagine it is a new idea and there is already a strategy in place. Using the evidence gathered in steps 1 to 5, look back at Chapter 9 on strategy and objectives to easily identify the strategic options for the business.

Step 8 – Create a strategy

Once the options have been identified, select two or three which are easiest to generate quick wins and refer back to Chapter 9 to build your recommended strategy.

Step 9 – Pause and present the strategy

At this stage you need to pause and to share the evidence gathered and present the strategy. There is no point spending time creating objectives and a plan if the senior management team has not seen the evidence and don't agree with the strategy. The most effective way to do this is to speak with your advocate and ask if you could both meet a few of the senior management team and 'ask for their opinion'. Share some of the evidence and say you are thinking about recommending the following strategy. This allows you to test the likelihood of the recommendations being adopted. This could result in several outcomes:

- The advocate can organise the meetings, which work well and result in the adoption of all recommendations.
- Meetings are organised with some members of the senior management team and some recommendations are adopted.

- The senior management team is unwilling to adopt any of the ideas, in which case a meeting is required with the advocate and the CEO to agree the best way to move forward.
- Alternatively it could be an unexpected response or a mix of these possibilities!

Activity 14.3 Organise the 9 Steps to Digital Transformation

Using the 9 steps to digital transformation, for an organisation of your choice, organise a plan of where they are on the journey of digital transformation.

What has been completed or needs to be done?

See Template online: Organise the 9 steps to digital transformation

Ethical Insights Digital Transformation Via Robots

Employing people is expensive. They need salaries, pension contributions, time off for holidays, and if they are sick someone else has to cover their work and you still have to pay them! Sounds outrageous? Many companies agree and this has created digital transformation projects where robots will step in.

Robots don't take time off, they don't need an office, they don't take tea breaks, they work any hours they are programmed for and when they cease functioning, there is no pension, just a recycling plant.

Senior business leaders recognise the benefits, but also the downside. Bill Gates has suggested that a robot tax should be introduced, partly to protect staff and to ensure companies don't replace them all with machines.

Whilst this may seem like a story from a sci-fi movie, the future is already here, as the telecoms company Nokia is working on a smart factory that includes 'Robot2robot collaboration and machine learning' (5GFWD, 2017).

14.9 BEYOND DIGITAL TRANSFORMATION

When you graduate if you land yourself that amazing role where an organisation has already embraced digital marketing, you may wish to move beyond digital transformation towards 'superior firm performance'.

In 2016 the *Journal of Marketing's* special issue considered the future of marketing, and writing in their introduction, three very well-known marketing professors, V Kumar (he is known as 'V'), Kevin Keller and Katherine Lemon explored the

boundaries of marketing (Kumar et al., 2016). Within their article they provided a ‘path to superior firm performance’ which I have included in Figure 14.6 and which is based on integrating all aspects of marketing.

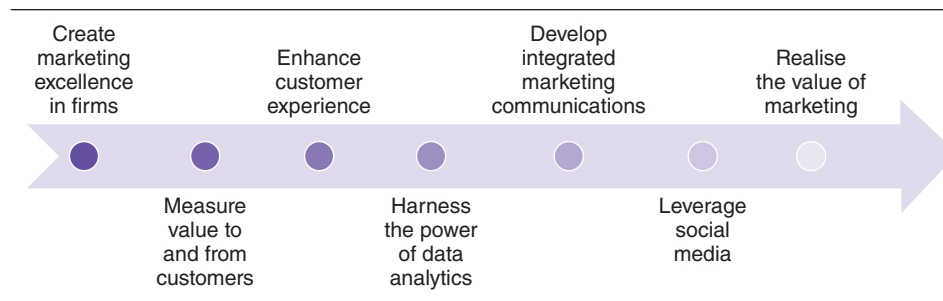


Figure 14.6 Path to superior firm performance

Source: Kumar, Keller and Lemon, 2016, p. 2

The first step to create marketing excellence, via the path to superior firm performance, started with the 7As in the marketing strategy process: Anticipation, Adaptation, Alignment, Activation, Accountability, Attraction and Asset management (Moorman and Day, 2016). This is an alternative method of a marketing strategy process where anticipating is about the application of the audit phase, so that the marketing team is aware of what could happen and when it does, respond by moving to step 2 (where are we now) and adapting the firm by aligning processes and activating the right types of behaviours. Accountability concerns the metrics, and attraction is more about staff retention than customer retention. The final ‘A’, asset management, considers all types of assets from content to people and customers.

The second element in Figure 14.6 is measuring or understanding customer value. This is more contentious and a subject that has been covered in marketing many times. Kumar and Reinartz (2016) use the idea of recency and frequency (how often do I spend money there) as well as total value and share of wallet. The conclusion focused on customer lifetime value, which I have discussed in Chapter 13, Digital Marketing Metrics, Analytics and Reporting.

The third element in Figure 14.6 is enhancing the customer experience, which is a critical part of the customer journey (see Chapter 2) and I would agree that this is a key starting point in any digital transformation project because it places the organisation in the customer’s shoes and highlights the ease or difficulty created by the organisation in conducting a transaction.

The fourth element in Figure 14.6, analytics, is a critical part of marketing which we addressed in Chapter 13. This is the one area most employers say is the largest gap for new graduates!

The fifth element in Figure 14.6 is about integrated marketing communications, which we have covered in this chapter. Professors Batra and Keller’s 7Cs of integration in Table 14.2 is a useful framework for integration.

In Chapter 11 we covered comprehensively how to manage social media and Chapter 3 explained the different tools that are available and addressed the sixth element in Figure 14.6.

The final stage in the path to superior firm performance concerns demonstrating the value of marketing. This is a thorny subject and one covered well by professors Dominique Hanssens and Koen Pauwels in their consideration of the use of dashboards (see Chapter 13) to visually display the impact of marketing results (Hanssens and Pauwels, 2016). The real benefit of digital marketing is the ability to measure, better manage and adapt as needed, to realise the value of marketing and make it obvious to others.

FURTHER EXERCISES

1. What is your experience of cross-media effects? Think about an ad campaign you have recently seen and identify what types of ads you saw and where. Discuss and evaluate the differences in the ad formats.
2. You have acquired some knowledge about integrated marketing frameworks. Using one of these frameworks, take an organisation of your choice and produce an integrated marketing plan that addresses all methods of communication throughout the customer journey.
3. Design a digital transformation plan for an organisation of your choice. What do you consider to be the main challenges? How and where will you find the advocate?

SUMMARY

This chapter has explored:

- How to integrate online and offline marketing using the 7Cs of integration.
- Ways to assess cross-platform integration.
- Methods of improving digital marketing from heatmaps to usability analysis.
- The 9 steps of digital transformation.

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