EMARKETING - THE ESSENTIAL GUIDE TO MARKETING IN A DIGITAL WORLD



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Book: eMarketing - The Essential Guide to Marketing in a Digital World (Stokes)

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Think

Introduction to Think

It seems too obvious to mention, but the foundation of consistently successful marketing communications lies in thorough planning and strategic preparation. Before you execute digital campaigns, you need to plan them. You need to research and understand your product, your communication challenge, your market, your competitors and, of course, your consumers. We call planning, strategy and research **Think**.

Think is the first step in a strategic process:

1. **Think**: Research, plan and strategise. Use the opportunities of digital to meet communication, market and product challenges. Plan assets and campaigns.
2. **Create**: Make beautiful assets, from websites and videos to banner adverts and applications.
3. **Engage**: Use channels to drive traffic to those assets and build relationships with customers.
4. **Optimise**: Track and analyse to understand how assets and campaigns are performing. Derive insight to improve and test assets and campaigns.

The first section of this book is devoted to Think.

Digital Marketing Strategy tackles how the Internet has changed and challenged the world in which we market, and how best to use digital tools and tactics for effective marketing strategies.

Market Research unpacks how to use the Internet to understand audiences and campaigns. The Internet was originally developed as an academic tool for sharing research. This is ideal for savvy marketers – this chapter addresses some considerations for online market research.

Content Marketing Strategy lays out the building blocks for effectively using content, not advertising, to reach audiences. Brands are required to think like publishers – which means a consideration of far more than just the end product. Content targeting, production, planning and distribution must be considered. This chapter lays out concepts and processes that assist in creating relevant content.

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About the Author

Rob Stokes earned his Business Science Degree at the University of Cape Town and is the 2009 Bookmarks Winner for the Best Individual Contribution to Digital award. His Marketing Honors Thesis, which focused on the topic of email marketing, led to development of the company Quirk eMarketing, which he currently is the CEO of. He is considered to be an eMarketing specialist and he lectures on Internet Marketing at the University of Cape Town, Red & Yellow School of Advertising and Cape Peninsula University of Technology. He also holds various workshops and presentations on eMarketing across the globe.

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1: THINK - STRATEGY AND CONTEXT

Learning Objectives

In this chapter, you will learn:

- How to define and distinguish business strategy and marketing strategy.
- How to think about digital audiences.
- The key building block concepts that are essential to any strategy.
- The questions that need to be asked when assembling a digital marketing strategy.

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1.1: Introduction

A strategy indicates the most advantageous direction for an organisation to take over a defined period of time. It also outlines which tactics and means should be used to execute this direction. Originating as a military term, strategy is about using your strengths, as well as the context in which you are operating, to your advantage.

In marketing, strategy starts with understanding what the business wants to achieve, or what problem it wants to solve. It then considers the context in which the business and its competitors operates, and outlines key ways in which the business and brand can gain advantage and add value.

In the early days of TV, when the medium was new and not yet entirely understood, there were separate 'TV planners' who created a 'TV strategy' for the brand. Over time, this was incorporated into the overall marketing strategy (as it should be). The same has happened with digital. Digital thinking should be incorporated into marketing strategy from day one. This chapter considers digital strategy separately in order to highlight some ways in which digital has affected our strategic approach to reaching customers and solving marketing problems.

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1.2: Key terms and concepts

Table 1.2.1

Term	Definition
Cluetrain Manifesto	A set of 95 theses organised as a call to action (CTA) for businesses operating within a newly connected marketplace.
Market share	In strategic management and marketing, the percentage or proportion of the total available market or market segment that is being serviced by a company.
Metric	A unit of measurement.
Pay per click (PPC)	Pay per click is advertising where the advertiser pays only for each click on their advert, not for the opportunity for it to be seen or displayed.
Return on investment (ROI)	The ratio of cost to profit.
Search engine optimisation (SEO)	SEO is the practice that aims to improve a website's ranking for specific keywords in the search engines.
Short Message Service (SMS)	Electronic messages sent on a cellular network.
Strategy	A set of ideas that outline how a product line or brand will achieve its objectives. This guides decisions on how to create, distribute, promote and price the product or service.
Tactic	A specific action or method that contributes to achieving a goal.

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1.3: What is marketing?

A simple definition for marketing is that it is the creation and satisfaction of demand for your product, service or ideas. If all goes well, this demand should translate into sales and, ultimately, revenue.

In 2012, Dr Philip Kotler defined marketing as “The science and art of exploring, creating, and delivering value to satisfy the needs of a target market at a profit. Marketing identifies unfulfilled needs and desires. It defines, measures and quantifies the size of the identified market and the profit potential” (Kotler, 2012).

The American Marketing Association (AMA), defines marketing as “The activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large” (AMA, 2017).

In order to motivate people to pay for your product or service, or to consider your organisation superior to your competitors, you need to create meaningful benefits and value for the consumer. The design of the product or service itself can arguably be a function of marketing. The value that a marketer should seek to create should be equal to or even greater than the cost of the product to the consumer. Doing this often and consistently will grow trust in, and loyalty towards, the brand and create strong brand equity.

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1.4: What is digital marketing?

How does digital marketing fit into this definition? There is, in fact, no difference between 'traditional' marketing and digital marketing. They are one and the same, apart from digital being specific to a medium.

Ultimately, the aim of any type of marketing is to keep and grow a customer base and stimulate sales in the future. Digital communication tools contribute towards connecting and building long-term relationships with customers.

What is digital? Bud Caddell defines 'digital' as "A participatory layer of all media that allows users to self-select their own experiences, and affords marketers the ability to bridge media, gain feedback, iterate their message, and collect relationships" (Caddell, 2013). In other words, digital is a way of exploring content and ideas (for users) and connecting with and understanding customers (for marketers).

Digital marketing is powerful in two fundamental ways. First, the audience can be segmented very precisely, even down to factors like current location and recent brand interactions, which means that messages can (and must) be personalised and tailored specially for them.

Second, the digital sphere is almost completely measurable. Every minute and every click by a customer can be accounted for. In digital you can see exactly how various campaigns are performing, which channels bring the most benefit, and where your efforts are best focused. Cumulatively, access to data that measures the whole customer experience should lead to data driven decision making.

> **Note**
>
> Learn more about this in the Data driven decision making chapter.

The complete scope of marketing is practised on the Internet. Products and services are positioned and promoted, purchased, distributed and serviced. The web provides consumers with more choice, more influence and more power. Brands constantly have new ways of selling, new products and services to sell, and new markets to which they can sell.

Digital marketing helps to create consumer demand by using the power of the interconnected, interactive web. It enables the exchange of currency but more than that, it enables the exchange of attention for value.

An exchange of value

If marketing creates and satisfies demand, digital marketing drives the creation of demand using the power of the Internet, and satisfies this demand in new and innovative ways.

A brand on the Internet can gain value in the form of time, attention and advocacy from the consumer. For the user value can be added in the form of entertainment, education and utility. Brands build loyalty among users who love their products or services and must align with users' values and aspirations. Users fall in love with products and services when their experience is tailored to their needs, and not the needs of the brand.

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1.5: Understanding marketing strategy

Business and brand strategy

Before you can delve into marketing strategy, take a step back and consider the business and brand with which you are working.

The end goal of any business is to make money in one way or another. Business strategy asks the questions, “What is the business challenge we are facing that prevents us from making more revenue?” and, “What business objective should we strive for in order to increase the money in the bank?”

The brand is the vessel of value in this equation. The brand justifies why the business matters, what the business’ purpose is and what value the business adds to people’s lives.

The AMA defines a brand as, “A name, term, design, symbol, or any other feature that identifies one seller’s good or service as distinct from those of other sellers. The usual expression of a brand is its trademark. A brand may identify one item, a family of items, or all items of that seller” (N.A., 2011). To quote Cheryl Burgess, a brand presents, “A reason to choose” one product or service over another.

The value of the brand is measured in terms of its brand equity i.e. how aware are people of the brand? Does it hold positive associations and perceived value? How loyal are people to the brand?

When you have the answers to these questions, you can formulate a marketing strategy to address the challenge or objective you’ve discovered.

Marketing strategy

The purpose of a marketing strategy is to determine what the business is about, and to then address the business or brand challenge, or objective that has been revealed. An effective strategy involves making a series of well-informed decisions about how the brand, product or service should be promoted. The brand that attempts to be all things to all people risks becoming unfocused or losing the clarity of its value proposition.

For example, a new airline would need to consider how it is going to add value to the market and differentiate itself from competitors. Whether their product is a domestic or international service; whether its target market is budget travellers or international and business travellers; and whether the channel is through primary airports or smaller, more cost-effective airports. Each of these choices will result in a vastly different strategic direction.

To make these decisions, a strategist must understand the context in which the brand operates, asking, “What are the factors that affect the business?” This means conducting a situational analysis that looks at the following four pillars:

1. The environment
2. The business
3. The customers
4. The competitors.

Here are some considerations and tools for conducting your brand’s situational analysis.

Understanding the environment

The environment is the overall context or ‘outside world’ in which the business functions. It can involve anything from global economics (how well is the local currency performing these days?) to developments in your industry. Every brand will have a specific environment that it needs to consider, based on the type of product or service it produces.

An analysis of the business and brand environment will typically consider political, economic, social, technological, legal and environmental (PESTLE) influences to identify a clear set of considerations or issues pertinent to the marketing strategy.

Understanding the business

There are several marketing models that can be used to understand the business and brand with which you are working. Since it's essential for all marketing messages to encapsulate the brand's identity and objectives, this is a very important step. A crucial consideration is the brand itself. What does it stand for? What does it mean? What associations, ideas, emotions and benefits do people associate with it? What makes it unique?



Figure 1.5.1: Understanding the business' brand *Adapted from Noesis Marketing, 2011.*

Out of this, you can determine what the brand or product's unique selling point (USP) is. A USP is the one characteristic that can make your product or service better than the competition's. Ask yourself, "What unique value does it have? Does it solve a problem that no other product does?"

Understanding customers

To understand your customers, you need to conduct market research. Try not to make assumptions about why people like and transact with your brand, you may find their values and motives are quite different from what you thought. Ongoing research and a data driven business will help you to build a picture of what particular benefit or feature your business provides to your customers allowing you to capitalise on this in your marketing content.

One important area on which to focus here is the consumer journey which is the series of steps and decisions a customer takes before buying from your business (or not). Luckily, online data analytics allow you to get a good picture of how people behave on your website before converting to customers; other forms of market research will also help you establish this for your offline channels.

On the Internet, a consumer journey is not linear. Instead, consumers may engage with your brand in a variety of ways, for example, across devices or marketing channels, before making a purchase.

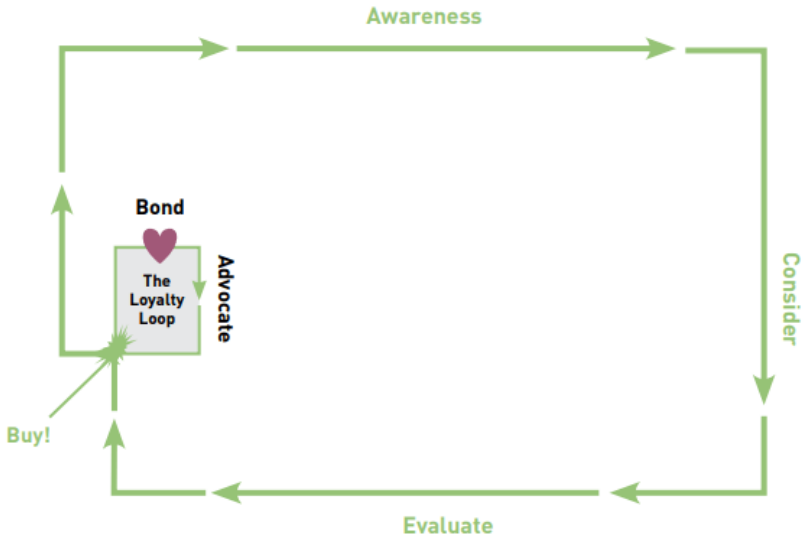


Figure 1.5.2: The customer journey is cyclical *Adapted from Brilliant Noise, 2012.*

The goal is to reach customers with the right marketing message at the right stage of their journey. For example, you may want to use aspirational messages for someone in the exploration phase, but focus on more direct features and benefits (such as a lower price) when they're almost ready to buy.

Understanding competitors

Finally, it's important to know who else is marketing to your potential customers, what they offer, and how you can challenge or learn from them. Many competitors target the same needs in a given customer, sometimes through very similar products. Positioning places your brand in a unique place in people's minds. It is impossible to create a strong value proposition or USP without knowing your competitors' positioning strategy.

On the Internet, your competitors are not just those who are aiming to earn your customers' money; they are also those who are capturing your customers' attention. With more digital content being created in a day than most people could consume in a year – for example, over 300 hours of video are uploaded to YouTube every minute (YouTube, 2017) – the scarcest resources these days are time, focus and attention.

When considering competition it's also worthwhile looking at potential replacements for your product. The Internet is disrupting and accelerating the pace of disintermediation in a number of industries, meaning that people can now go directly to the business instead of transacting through a middleman (look at the travel industry as an example). To stay ahead, you should be looking at potential disruptors of your industry as well as the existing players.

Digital marketing strategy

Once you have a clear sense of what the business challenge or objective is, you can define how your marketing strategy will leverage digital channels to fulfil it.

As discussed in the introduction, digital should not be considered as separate from your core strategy. Digital marketing builds on and adapts the principles of traditional marketing using the opportunities and challenges offered by the digital medium.

A marketing strategy should be constantly iterating and evolving. Since the Internet allows for near-instantaneous feedback and data gathering, marketers should constantly be optimising and improving their online marketing efforts.

User-centric thinking, which involves placing the user at the core of all decisions, is vital when looking at building a successful marketing strategy. The marketing strategist of today is offered not only a plethora of tactical possibilities, but also unprecedented ways of measuring the effectiveness of chosen strategies and tactics. Digital allows greater opportunities for interaction and consumer engagement than were possible in the past, so it is important to consider the ways in which the brand can create

interactive experiences for consumers, not just broadcast messages.

The fact that digital marketing is highly empirical is one of its key strengths. Almost everything can be measured: from behaviours, to actions and action paths, to results. Insight tools can even be used to track the sentiment of users towards certain elements online. This means that the digital marketing strategist should be constantly measuring and adapting to ensure the highest ROI. Built into any strategy should be a testing framework and the ability to remain flexible and dynamic in a medium that shifts and changes as user behaviours do.

If we defined strategy as ‘a plan of action designed to achieve a particular outcome’, the desired outcome of a digital marketing strategy would be aligned with your organisation’s overall business and brand building objectives or challenges. For example, if one of the overall objectives was acquisition of new clients, a possible digital marketing objective might be building brand awareness online.

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1.6: The Building Blocks of Marketing Strategy

The following building-block techniques will help you structure a marketing strategy, both online and offline, that addresses your core business challenges. These strategy models are just starting points and ways to help you think through problems. As you grow in experience and insight, you could find yourself relying on them less or adapting them.

Porter's Five Forces analysis

Porter's Five Forces analysis is a business tool that helps determine the competitive intensity and attractiveness of a market. The Internet's low barrier to entry means that many new businesses are appearing online, providing countless choices for customers. This makes it important to consider new factors when devising a marketing strategy.



Figure 1.6.1: Porter's Five Forces

The Four Ps

The Four Ps of marketing help you structure the components that make up a brand's offering, differentiators and marketing. They have been fundamentally changed by the Internet and need to be looked at in the context offered by digitally connected media and from the perspective of the consumer. How your brand is positioned in the mind of your consumer will ultimately determine your success.

1. Products (and services)

Products and services are what a company sells. The Internet enables businesses to sell a huge range of products, from fast-moving consumer goods and digital products such as software, to services such as consultancy. In fact, the Internet has in some cases made it possible for a product or service to exist. Consider Uber and Airbnb. Online, the experience the user has in discovering and purchasing can be considered part of the product the brand provides, or be the product itself.

The Internet has enabled hyper-personalisation. For example, Nike (nikeid.nike.com) and Converse (www.converse.com) allow customers to customise their own trainers. The Internet as a distribution medium also makes it possible for products, such as software and music, to be sold digitally.

2. Price

The prevalence of search engines and of shopping comparison websites, such as www.pricerunner.co.uk, and www.nextag.com, makes it easy for customers to compare product prices across a number of retailers. This makes the Internet a market of near-perfect competition (Porter, 2008). The internet allows for personalised and flexible pricing strategies to a level that traditional retailers would find almost impossible to achieve.

With price differentiation becoming a challenge, especially for smaller players in the market, businesses need to consider differentiating on value. Value is a combination of service, perceived benefits and price, where customers may be willing to pay a higher price for a better experience or if they feel they are getting something more than just the product.

3. Placement (or distribution)

Product distribution and markets no longer have to be dictated by location. By simply making their products visible online (for example, on a website or Facebook page), brands can reach a global market. The key is to reach and engage customers on the channels they are using. This is why choosing your digital tactics is vital. You want to engage customers on their terms, not yours.

4. Promotion

The Internet, as an information and entertainment medium, naturally lends itself to promoting products. The online promotional mix is an extension of the offline, but with some significant differences. For one, online promotion can be tracked, measured and targeted in a far more sophisticated way.

Promotion doesn't just mean advertising and talking at customers. On the Internet, it's crucial to engage, collaborate and join conversations, too. Interacting with customers helps build relationships, and the web makes this sort of communication easy. That's why a good portion of this book is devoted to engagement tactics and tools.

> **Note**
>
> Many additional Ps have been suggested and debated over time. We've restricted our discussion to the four listed here, but you should do some research and join the debate with your own point of view.

SWOT analysis

A SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis is an ideal way to understand your business and your market.

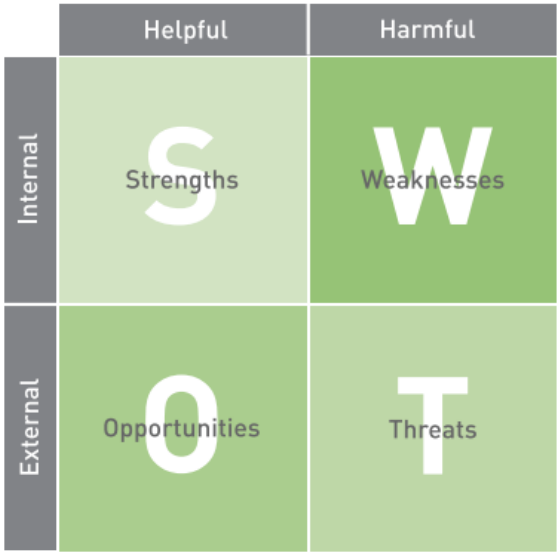


Figure 1.6.2: SWOT analysis

Always have a purpose in mind when conducting a SWOT analysis. For example, study the external threats to your business, and see how learning from these can help you overcome internal weaknesses. This should tie back in to your business and marketing objectives and strengths should be promoted, opportunities should be sought out, while threats and weaknesses should be minimised as much as possible. A SWOT analysis is part of a situational analysis and identifies the key issues that direct the marketing strategy. Be mindful of the fact that weaknesses can be opportunities and strengths threats, especially in the world of digital disruption.

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1.8: Crafting a digital marketing strategy

Any activity with an end goal (whether it's winning a war, building a city or selling a product) should have a blueprint in place for every person in the organisation to follow. In digital marketing, however, there is no single definitive approach so each business must create its own roadmap. However, there are questions you can use to guide this process.

A strategy needs to cover the questions of who you are and who you are not. It should also include what you are offering and to whom, as well as why and how you are doing so. The steps and questions below cover what an organisation should be aware of when creating and implementing a strategy that will meet its marketing objectives and solve its challenges.

1. Context

The first step in crafting a successful strategy is to examine the context of the organisation and the various stakeholders. We covered this under marketing strategy earlier in this chapter, but it bears repeating.

- What is the context in which you are operating (PESTLE factors) and how is this likely to change in the future?
- Who are you, why does your brand matter and what makes your brand useful and valuable?
- Who are your customers, and what needs, wants and desires do they have?
- Who are your competitors? These may extend beyond organisations that compete with you on the basis of price and product and could also be competition in the form of abstracts such as time and mindshare. Thorough market research will reveal the answers to these questions.

2. Value exchange

Once you have examined the market situation, the second step is an examination of your value proposition or promise: in other words, what unique value your organisation can add to that market. It is important to identify the supporting valueadds to the brand promise that are unique to the digital landscape. What extras, beyond the basic product or service, do you offer to customers?

The Internet offers many channels for value creation. However, the definition of what is 'valuable' depends largely on the target audience, so it is crucial to research your users and gather insights into what they want and need. Gathering the right data can help you evolve this value exchange over time.

3. Objectives

When setting your digital marketing goals, there are four key aspects to consider: objectives, tactics, key performance indicators (KPIs) and targets. Let's look at each one in turn.

Objectives

Objectives are essential to any marketing endeavour, without them your strategy would have no direction and no end goal or win conditions. It's important to be able to take a step back and ask, "Why are we doing any of this? What goal, purpose or outcome are we looking for?"

- What are you trying to achieve?
- How will you know if you are successful?

Sometimes, words like 'objective' can be used in different situations with slightly different meanings. Remember, the objective of a website or online campaign is aligned with the strategic outcomes of the business. The objective of a campaign may be to create awareness for a new business or increase sales of a product. The objective answers the question, "What do we want to achieve with this marketing campaign?" For example, an objective might be to increase the sales of a product, grow brand awareness or increase website traffic. A business objective (something that your business will either do or not do) and a marketing objective (a change in customer behaviour that your business wants to achieve) are not the same thing!

Objectives need to be SMART:

- **Specific** – the objective must be clear and detailed, rather than vague and general.
- **Measurable** – the objective must be measurable so that you can gauge whether you are attaining the desired outcome.
- **Attainable** – the objective must be something that is possible for your brand to achieve, based on available resources.
- **Realistic** – the objective must also be sensible and based on data and trends; don't exaggerate or overestimate what can be achieved.
- **Time-bound** – finally, the objective must be linked to a specific timeframe.

Goals

The goal of a website or campaign in web analytics refers to an action that a user takes on a website or a type of user behaviour. This action could be making a purchase, signing up for a newsletter, or viewing a certain number of pages in a visit. A completed goal is called a conversion. Goals are derived from objectives and answer the question, "What do we need users to do in order to achieve our objective?"

> Note
>
> Goals related to visitor behaviour, such as time spent on site or pageviews per visit, are referred to as engagement goals.

Tactics

Objectives are not the same as tactics. Tactics are the specific tools or approaches you will use to meet your objectives, for example, a retention-based email newsletter, a Facebook page, or a CRM implementation. As a strategy becomes more complex, you may have multiple tactics working together to try to achieve the same objective. Tactics may change (and often should), but the objective should remain your focus. We'll look at tactics in more detail in the next section.

Key performance indicators (KPIs)

Key performance indicators or KPIs are metrics that are used to indicate whether tactics are performing well and meeting your objectives. There are many metrics to be analysed, and determining which are important will help to focus on what really matters to a particular campaign. KPIs relate closely to goals, and answer the question, "What data do we need to look at to see if goals are being completed?" For example, if your objective is to increase website traffic, you may look at the number of website visitors, the percentage of new visitors, and how long users stay on the site.

KPIs are determined per tactic, with an eye on the overall objective. The diagram below shows how a number of KPIs can feed into one goal, and a number of goals can in turn feed into one objective. A single objective can have a number of goals, each with their own number of KPIs, to ensure it is achieved.

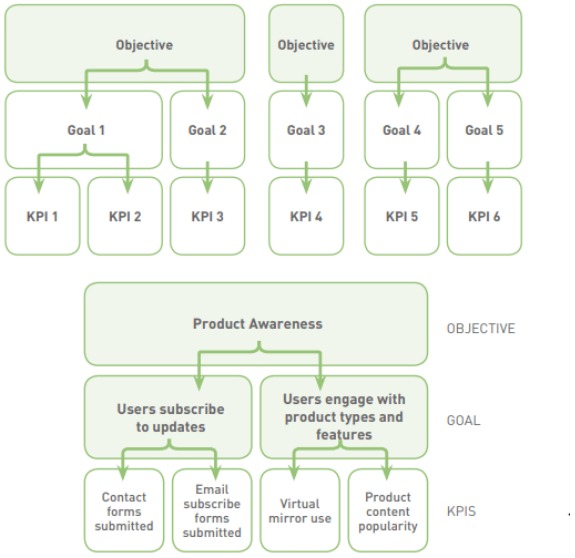


Figure 1.8.1: Objectives, goals and KPIs. *Adapted from Kaushik, 2010.*

Targets

Finally, targets are the specific values that are set for your KPIs to reach within a specific time period. That is, they are the actual target values that KPIs need to meet in order for the campaign to be declared a success. Sportspeople need to reach targets to advance their careers, for example, come in the top ten to qualify for the final, or run 10 km in under 27 minutes. If you meet or exceed a target, you are succeeding; if you don't reach it, you're falling behind on your objectives and you need to reconsider your approach (or your target). If one KPI is 'newsletter subscriptions', then a target might be '100 subscriptions every month' so if one month falls short at 70, this will quickly reveal that a fix is required.

When setting objectives and targets for any campaign, remember to think about overlaps in customer behaviour that might impact how you measure your success. People might click on an ad and visit your website to buy something, but they could also browse and then go and buy something in the brick-and-mortar store. The total economic value of online activities needs to account for this so that you can get an idea of the true contribution digital is making.

Example 1.8.1

Here is an example:

SMART objective:

- Increase sales through the eCommerce platform by 10% within the next six months.

Tactics:

- Search advertising
- Social media marketing using the Facebook brand page

KPIs per tactic:

- Search advertising – number of search referrals, cost per click on the ads
- Facebook brand page – number of comments and shares on campaignspecific posts

Targets per tactic:

- Search advertising – 1 000 search referrals after the first month, with a 10% month-on-month increase after that
- Facebook brand page – 50 comments and 10 shares on campaign-specific posts per week

4. Tactics and evaluation

Many digital tools and tactics are available once you have defined your digital marketing objectives. Each tactic has its strengths – for example, acquisition (gaining new customers) may best be driven by search advertising, while email is one of the most effective tools for selling more products to existing customers. The table below expands on some of the most popular tactics available to digital marketers and their possible outcomes. These will be covered in far more detail in the Engage section of this book.

Table 1.7.1: Marketing tactics.

Tactic	Outcome
SEO	Customer retention and acquisition
This is the practice of optimising a website to rank higher on the search engine results pages for relevant search items. SEO involves creating relevant, fresh and user-friendly content that search engines index and serve when people enter a search term that is relevant to your product or service.	SEO has a key role to play in acquisition, as it ensures your organisation's offering will appear in the search results, allowing you to reach potential customers. A site that is optimised for search engines is also a site that is clear, relevant and well designed. These elements ensure a great user experience, meaning that SEO also plays a role in retention.
Search advertising	Sales, customer retention and acquisition
In pay-per-click or search advertising, the advertiser pays only when someone clicks on their ad. The ads appear on search engine results pages.	The beauty of search advertising is that it is keyword based. This means an ad will come up in response to the search terms entered by the consumer. It therefore plays a role in sales, acquisition and retention. It allows the advertiser to reach people who are already in the buying cycle or are expressing interest in what they have to offer.
Online advertising	Branding and acquisition
Online advertising covers advertising in all areas of the Internet – ads in emails, ads on social networks and mobile devices, and display ads on normal websites.	The main objective of online advertising is to raise brand awareness online. It can be more interactive and therefore less disruptive than traditional or static online advertising, as users can choose to engage with the ad or not. Online advertising can be targeted to physical locations, subject areas, past user behaviours, and much more.
Affiliate marketing	Sales and branding
Affiliate marketing is a system of reward whereby referrers are given a 'finder's fee' for every referral they give.	Online affiliate marketing is widely used to promote eCommerce websites, with the referrers being rewarded for every visitor, subscriber or customer provided through their efforts. It is a useful tactic for brand building and acquisition.
Video marketing	Branding, customer retention and value creation
Video marketing involves creating video content. This can be wither outright video advertising, or can be valuable, useful, content marketing.	Since it is so interactive and engaging, video marketing is excellent for capturing and retaining customer attention. Done correctly, it provides tangible value – in the form of information, entertainment or inspiration – and boosts a brand's image in the eyes of the public.
Social media	Branding, value creation and participation
Social media is media in the form of text, visuals and audio, that can be shared online. It has changed the face of marketing by allowing collaboration and connection in a way that no other channel has been able to offer.	From a strategic perspective, social media, is useful for brand building, raising awareness of the brand and its story, and encouraging the customer to become involved with the brand. The shareable and accessible nature of social media platforms allows brands to communicate and engage directly with their customers. Social media also offers brands a way to interact with their customers, instead of just broadcasting to them.
Email marketing	Customer retention and value creation

Email marketing is a form of direct marketing that delivers commercial and content-based messages to an audience. It is extremely cost effective, highly targeted, customisable on a mass scale and completely measurable – all of which make it one of the most powerful digital marketing tactics.	Email marketing is a tool for building relationships with potential and existing customers through valuable content and promotional messages. It should maximise the retention and value of these customers, ultimately leading to greater profitability for the organisation a whole. A targeted, segmented email database means that a brand can direct messages at certain sectors of their customer base in order to achieve the best result.

Once the objectives and tactics have been set, these should be cross-checked and re-evaluated against the needs and resources of your organisation to make sure your strategy is on the right track and no opportunities are being overlooked.

5. Ongoing optimisation

It is increasingly important for brands to be dynamic, flexible and agile when marketing online. New tactics and platforms emerge every week, customer behaviours change over time, and people's needs and wants from brand evolve as their relationship grows.

This process of constant change should be considered in the early stages of strategy formulation, allowing tactics and strategies to be modified and optimised as you go. After all, digital marketing strategy should be iterative, innovative and open to evolution.

Understanding user experience and the user journey is vital to building successful brands. Budget should be set aside upfront for analysing user data and optimising conversion paths.

Social thinking and socially informed innovation are also valuable and uniquely suited to the online space. Socially powered insight can be used to inform strategic decisions in the organisation, from product roadmaps to service plans. Brands have moved away from being merely present in social media towards actively using it, aligning it with actionable objectives and their corresponding metrics. This is critical in demonstrating ROI and understating the opportunities and threats in the market.

Managing the learning loop (the knowledge gained from reviewing the performance of your tactics, which can then be fed back into the strategy) can be difficult. This is because brand cycles often move more slowly than the real-time results you will see online. It is therefore important to find a way to work agility into the strategy, allowing you to be quick, creative and proactive, as opposed to slow, predictable and reactive. The data collected around success of your marketing strategy should feed into a larger pool of information used to drive business decisions.

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1.9: Case study - Vets now - Taking care of the brand

One-line summary

Vets now, an industry-known UK accident and emergency veterinarian service, wanted to become the brand of choice amongst consumers and veterinarians.



Figure 1.9.1: The Vets now Logo

The challenge

Vets now provided their accident and emergency service to over 1 000 veterinary practices across the UK. But, with more and more smaller local emergency veterinary clinics opening, and day clinics starting to offer out-of-hours services, Vets now was experiencing intense competition. They decided to target pet owners directly and make themselves the brand of choice for pet owners, if and when their pet required emergency care.

However, the brand didn't deal directly with clients too often, and brand awareness of Vets now among pet owners was at about 8% (despite 1 in 4 UK vet practices using the service). The brand was also offering inconsistent sub-brands, which confused pet owners.

Vets now wanted to improve brand awareness, consolidate their offering, and offer a pet-owner led approach.

The solution

Vets now recognised that they needed to conduct a brand audit to determine their unifying core purpose. A brand workshop was held, and the key insight was that emergency and critical care was the heart of the brand. All other sub-brands and straplines were negating from this core message. The brand wanted to present a singular pet owner brand proposition and developed the single unifying strapline: Introducing Vets now – Your pet emergency service.

To appeal to customers directly, they needed to know who their potential customers were and what their feelings were towards their pets. Vets now conducted surveys, interviews and focus groups with over 1 000 pet owners. They identified 8 pet owner types, and highlighted the key drivers behind pet ownership in the UK. They then mapped out the owner types against these drivers.

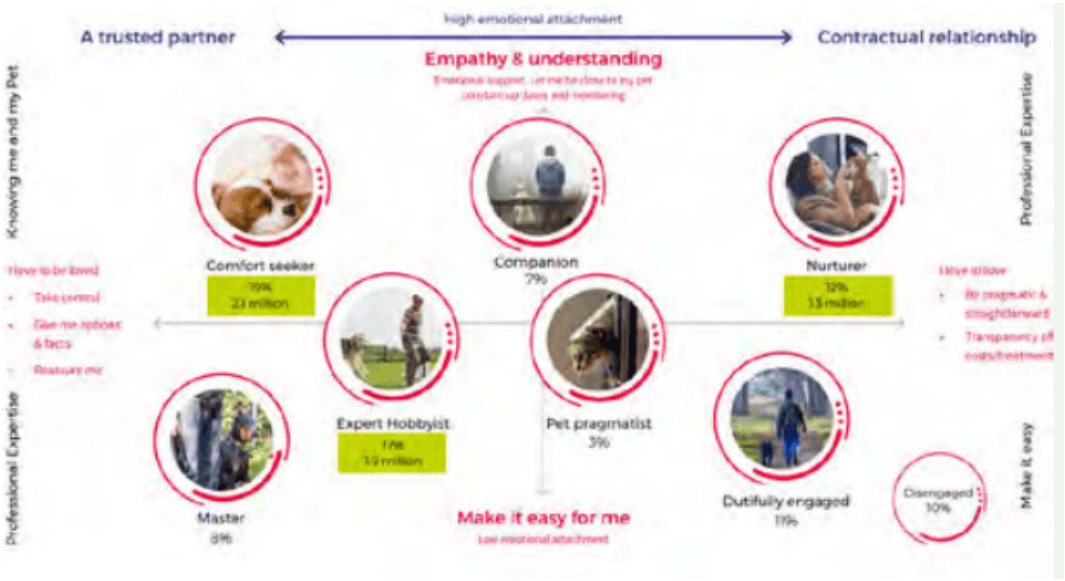


Figure 1.9.2: Vets now's map of pet ownership

The key insight was that pet owners expect others to treat their pets as they would other human beings. This means that the care and professionalism offered to pets is paramount. Pet-owners are dedicated to keeping their pet happy and healthy, and want the best care possible if an emergency were to occur. Pet owners needed emotional support and reassurance when dealing with an emergency involving their pet.

Vets now also identified three touchpoints of customers with the brand.

- Search and online – finding an emergency vet
- Clinical – referred to Vets now by another veterinary clinician
- Social space – engaging with other pet owners and online content.

Using these insights, the brand consolidated itself as one single brand offering. The brand also identified its essential brand principles and used these to inform all its branding and marketing communication. Vets now created new branding and imagery and chose a reassuring and expert but friendly and straightforward tone of voice to use across all communications. This unified and consolidated look and feel conveyed the core purpose of the brand and offered consumers brand recognition.

This new look and feel was rolled out across the website, Vets now hospitals and clinics, internal branding, and in print and digital marketing campaigns. These were chosen to ensure the new branding reached consumers at all three touchpoints.

The marketing campaign included various platforms and a mixture of traditional and digital tactics. There were print and digital ads, as well as content delivered across the website, social media, printed flyers and in-clinic posters. Content included emergency plans for if a pet becomes ill or has an accident, dangers that are present in the home over the Christmas holiday period, and how to ensure a pet stays happy and healthy over the festive season. This content was specifically created to resonate with the audience and used the insights gained from the in-depth research conducted by the brand to inform content development and creation.

The results

The research and ensuing strategy ensured the brand's awareness among customers increased. After the campaigns and rebranding, 59% of respondents had an unprompted recall of Vets now, up 20% from before the campaign. Within the sample of respondents, propensity to use Vets now after the campaign was up 138% from before. These were strong indicators of positive performance. The new website also saw a 23% drop in bounce rate within 5 days of going live, showing that the brand was now more in line with what users were searching for.

The importance of relooking at your brand and really investigating your customers is clearly demonstrated in this case study. It shows how a B2B brand can reposition itself as B2C with the right analysis and strategy. Clearly laying down your objectives, doing the necessary research and identifying how to address your customer across all touchpoints is essential to marketing strategy

(Marketing Society, 2017).

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1.10: The bigger picture

All of the chapters in this book are linked to digital marketing strategy in one way or another.

A solid business and brand strategy should be the starting point of any marketing venture, and you should always keep one eye on it as you develop specific campaigns, platforms and approaches. After all, you should always remember that you are trying to reach your chosen audience by communicating to them in the most effective way, to build rewarding and lucrative long-term relationships.

While strategy helps you understand the questions you should ask, data collected across your business, including market research, provides the information you need to answer them.

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1.E: Digital Marketing Strategy(Exercises)

Case Study Questions

1. What was Vets now's new brand strategy?
2. Why was it necessary for Vets now to do such extensive customer research?
3. Could it be argued that this case study covers a business strategy rather than a marketing strategy?

Chapter Questions

1. Why is it important to consider the business context when planning your marketing strategy?
2. How has the Internet affected marketing and the models we use to understand it?
3. Do you agree with the idea that customers are more empowered than they were before digital communications were so prevalent? Justify your answer.

Further reading

www.sethgodin.typepad.com – Seth Godin's popular blog provides regular insight and food for thought.

smithery.co – A marketing and innovation blog that teaches marketers to 'Make Things People Want, rather than spend all their energy and resources trying to Make People Want Things'.

www.gigaom.com – GigaOM's community of writers covers a wide range of technological copies.

Positioning: The Battle for Your Mind – This book by Ries & Trout published in 2002 offers excellent advice claiming space in the minds of consumers.

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1.S: Digital Marketing Strategy(Summary)

Strategy is the essential first step in positioning your brand within the market and creating a roadmap for achieving your business goals. While there are many different paths one can take, there is a clear process for understanding where you are, where you need to be, and how you will get there.

It all starts with understanding the business challenges that your brand faces. From here, an effective marketing strategy looks at the market context, weighs the available options and makes important choices, based on solid research and data. Digital marketing strategy adds a layer of technology, engagement and iterative optimisation into the mix. The wide variety of tools and tactics offered by the digital medium should inform your strategic choices.

Digital marketing strategy is highly empirical and your strategic thinking should be mindful of ROI and how it can be measured. This will allow you to optimise your tactics and performance in order to create a valuable brand story, an excellent user experience, the most optimised conversion funnels, and the highest ROI.

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2: THINK - UNDERSTANDING CUSTOMER BEHAVIOUR

Learning Objectives

In this chapter, you will learn:

- Conceptual tools for understanding your customer.
- Key concepts for thinking about your target audience.
- Some Behavioural economic theories.
- How digital has affected customer behaviour

2.1: Introduction

2.2: Key terms and concepts

2.3: Understanding customer behaviour

2.4: Key digital concepts influencing customer behaviour

2.5: Tools for understanding your customer

2.6: Measuring success

2.7: Case study - Argos

2.8: The bigger picture

2.9: References

2.E: Understanding Customer Behaviour (Exercises)

2.S: Understanding customer behaviour(Summary)

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2.1: Introduction

Although marketing is a business function, it is primarily an exercise in applied human psychology. The role of marketing is to address customer needs and provide value. In either case, success requires a nuanced understanding of how people think, process and choose within their environment.

To achieve this, one must strike a balance between awareness of global shifts and impacts on people's behaviour and the fiercely intimate motivations that determine where individuals spend their time and money. This chapter outlines an approach for understanding customer behaviour and introduces some conceptual tools used to frame and focus how you apply that understanding to your marketing efforts.

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2.2: Key terms and concepts

Table 2.2.1

Term	Definition
Attention economy	The idea that human attention is a scarce commodity i.e. seeing attention as a limited resource.
Customer experience map	A visual representation of the customers' flow from beginning to end of the purchase experience, including their needs, wants, expectations, and overall experience.
Customer persona	A detailed description of a fictional person to help a brand visualise a segment of its target market.
Global citizen	A person who identifies as part of a world community and works toward building the values and practices of that community.
Tribe	A social group linked by a shared belief or interest.
Product	An item sold by a brand.
Story	A narrative that incorporates the feelings and facts created by your brand, intended to inspire an emotional reaction.

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2.3: Understanding customer behaviour

The study of consumer behaviour draws on many different disciplines, from psychology and economics to anthropology, sociology and marketing. Understanding why people make the decisions they do forms part of a complex ongoing investigation.

Marketing and product design efforts are increasingly focusing on a customercentric view. Rather than making people want stuff, successful organisations are focused on making stuff people want. Given the plethora of options, product or service attributes, pricing options and payment choices available to the connected consumer today, competition is fierce, and only the considered brand will succeed. Understanding the consumers' behaviour lies at the heart of offering them value.

Consider that no point of engagement with your brand occurs in isolation for your customer. Their life events, social pressures and motivations impact on their experience with your brand. Something happened before and after they bought that box of cereal, and their experience with it does not start or end at the point of sale.

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2.4: Key digital concepts influencing customer behaviour

The impact of digital

Digital disruption, which is discussed throughout this book, can appear in many small and large ways. If there's one thing the past 10 years has taught us, it's that there is constant disruption and upheaval in the digital world. How we communicate with one another, how we shop, how we consume entertainment, and ultimately how we see ourselves in the world, has all changed because of digital. And these changes are continuing, even accelerating.

One of the results of digital tools and media is a destabilising of the status quo. All industries are vulnerable to change when a product or service comes along that meets user needs in an unprecedented way. Netflix has disrupted the media industry, Airbnb has changed travel, and Uber has dramatically impacted what individuals can expect from transport options.

Consider that people born after 1985, more than half the world's population, have no idea what a world without the Internet is like. They only know a rapid pace of advancement and some tools that serve them better than others.

The Internet seeks no middlemen. Established industries or organisations can be bypassed completely when people are placed in control. Your customers can find another option with one click, and are increasingly impatient. They are not concerned with the complexity of the back end. If Uber can offer them personalised cash-free transportation, why can't your product offer something comparable? People will use the service that best serves them, not what best serves an industry or existing regulations.

The global citizens and their tribe

Coupled with these empowered digital consumers, who are changing digital and driving disruption as much as digital is changing them, is the contradiction evident in the relationship between a global citizen and increasingly fragmented and differentiated tribes built around interests. National identity, given global migration and connectivity, has shifted as the world has gotten smaller. On the other hand, the Internet has created space for people to create, form, support and evolve their own niche communities. This duality forces marketers to keep cognisant of global shifts while tracking and focusing on niche communities and specific segments within their market.

The attention economy

The attention economy is a term used to describe the large number of things competing for customer attention. Media forms and the mediums through which they can be consumed have exploded over the last decade, and it's increasingly difficult to get the attention of those you are trying to reach. Your customer is distracted and has many different things vying for their attention.

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2.5: Tools for understanding your customer

Despite the complexity of the customer landscape, various tools and frameworks are available to consider your customer. The goal with many of these is to inform your decision making and help you think from the perspective of your customer.

Developing user personas

To understand all your customers, you must have an idea of who they are. While it's impossible to know everyone who engages with your brand, you can develop representative personas that help you focus on motivations rather than stereotypes.

A user persona is a description of a brand-specific cluster of users who exhibit similar behavioural patterns in, for example, their purchasing decisions, use technology or products, customer service preferences and lifestyle choices. We revisit the user persona at multiple points during this course, as it shouldn't be seen as an end in itself.

A user persona is a consensus-driving tool and a catalyst that can be applied when you try to understand your entire customer experience, or when you decide on the implementation of specific tactics. Every organisation should have four to five user personas to help strategists target their efforts.

To create a user persona and inform decisions with your customers point of one must prioritise real information over your team's assumptions and gut feelings.

Desktop research, drawn from sources such as existing reports and benchmarking studies, help you to frame the questions you need to ask when delving deeper into the data available to you elsewhere through online platforms like your website or social media presence. The Internet provides an increasing number of viable alternatives to offline primary research.

> **Note**
>
> Market research methodologies are explored in more detail in the Market research chapter.

A combination of habits and specific needs are combined into a usable overall picture A key feature of the user persona below is how it accounts for customer motivation Summer is driven by emotion rich storytelling and social belonging. This knowledge should drive how the brand communicates how the brand experience is tailored to make her feel tike part of a community.

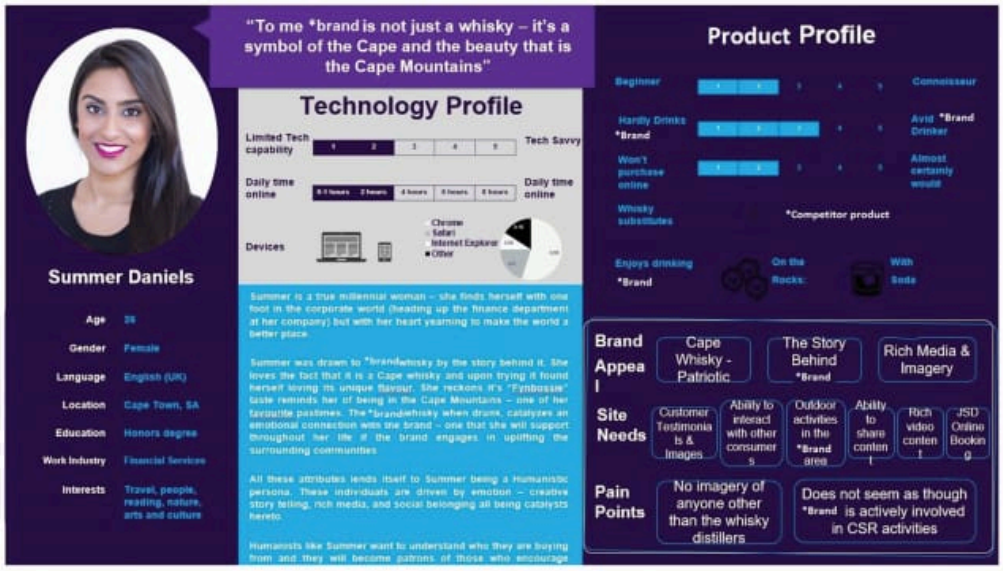


Figure 2.5.1: User personas are a consensus-driving tool *Permission from Mirum*

To build a robust user persona, you should consider the demographics, psychographics, and motivators for your customers.

Demographics and psychographics

Understanding customers can involve two facets:

1. Understanding the physical facts, context and income of their 'outer world" i.e. their demographics. These include their culture, sub cultures, class and the class structures in which they operate, among other factors.
2. Understanding the motives, desires, fears and other intangible characteristics of their 'inner world' i.e. their psychographics. Here we can consider their motives, how they learn and their attitudes.

Both facets above are important, though some factors may be more or less prominent depending on the product or service in question. For example, a women's clothing retailer needs to consider gender and income as well as feelings about fashion and trends equally, while a B2B company typically focuses on psychographic factors, as their customers are linked by a job function rather than shared demographics.

Demographics can be laborious to acquire but are generally objective and unambiguous data points that change within well-understood and measurable parameters, for example, people get older, incomes increase or decrease, people get married or have children. Data sources like censuses, surveys, customer registration forms and social media accounts are just a few places where demographic data can be gathered either in aggregate or individually.

Psychographics, on the other hand, are fluid, complex and deeply personal because, after all, they relate to the human mind. This information is very hard to define, but when complementary fields work together, it's possible for marketers to uncover a goldmine of insight.

Understanding motivation

People make hundreds of decisions every day, and are rarely aware of all of the factors that they subconsciously consider in this process. That's because these factors are a complex web of personal motivating factors that can be intrinsic or extrinsic, and positive or negative.



Figure 2.5.2: Extrinsic and intrinsic motivators

Extrinsic motivators

Extrinsic factors are external, often tangible, pressures, rewards, threats or incentives that motivate us to take action even if we don't necessarily want to. For example, a worker in a boring or stressful job may be motivated to keep going by their pay check, and drivers are motivated to obey traffic rules by the threat of getting a fine or hurting someone.

Marketing often uses extrinsic motivators to provide a tangible reward for taking a desired action. Some examples include:

- **Limited-time specials and discounts**, where the customer is motivated by a perceived cost saving and the urgency of

acting before the offer is revoked.
- **Scarcity**, where the limited availability of a product or service is used to encourage immediate action.
- **Loyalty programmes**, which typically offer extrinsic rewards like coupons, exclusive access or free gifts in exchange for people performing desired behaviours.
- **Ancillary benefits**, such as free parking at the shopping centre if you spend over a certain amount at a specific store.
- **Free content or downloads in exchange for contact details**, often used for subsequent marketing activities.

For example, Booking.com uses a range of extrinsic motivators to encourage customers to book quickly, including a price discount exclusive to their site and urgency through the use of the words “High demand”, “Only three rooms left” and, “There are two other people looking at this hotel”. All of these factors nudge the customer to book quickly to avoid missing out on what is framed as a limited-time opportunity.



Figure 2.5.3: A screenshot of Booking.com using extrinsic motivators *Screenshot, Bookings.com 2016*

The problem with extrinsic motivation is that a customer can often perform the desired action to get the reward or avoid the threat without fully internalising the meaning or marketing message behind the gesture. Or worse, the required action becomes ‘work’ which diminishes the enjoyment of the task and the reward.

For example, some people will swipe in at the gym with their membership card to avoid losing their access, but won’t actually exercise. Some might log in to a website every day to accumulate points without actually looking at the specials on offer.

Kohn (1993) summarised the three risks of extrinsic rewards as:

1. “First, rewards encourage people to focus narrowly on a task, to do it as quickly as possible and to take few risks.
2. Second, people come to see themselves as being controlled by the reward. They feel less autonomous, and this may interfere with performance.
3. Finally, extrinsic rewards can erode intrinsic interest. People who see themselves as working for money, approval or competitive success find their tasks less pleasurable, and therefore do not do them as well.”

Intrinsic motivators

Somebody who is intrinsically motivated performs an action for an intangible benefit simply because they want to, or for the pleasure, fun or happiness of it. Intrinsic motivators are much subtler and more difficult to quantify, but are also more powerful and longer-lasting drivers of human behaviour.

Some common forms of intrinsic motivation include:

- **Love** – not just romantic love, but also the love of an activity or outcome.
- **Enjoyment and fun** – few intrinsic motivators are as powerful as the desire to have a good time.

- **Self-expression** – some people act in a certain way because of what they feel the action says about them.
- **Personal values** – values instilled through cultural, religious, social or other means can be powerful motivators.
- **Achievement or competence** – when people challenge themselves, take a meaningful personal risk, or attain a long-desired goal, they are acting because of an intrinsic motivation.
- **Negative intrinsic motivators** – fear, embarrassment and inertia are some powerful drivers that rely on negative emotions.

Finding the right motivators

Many brands develop elaborate marketing campaigns with gimmicks and rewards, but find that these fall flat. Often this is because of a misunderstanding of the motivators that drive customers to take action in the first place. Marketers tend to overvalue how much people like, understand and care about brands, which can lead to a disconnection from the audience.

The most important factor to consider in choosing a customer motivator is relevance to the customer, to the brand and to the campaign. Ask yourself, "Is the incentive you are offering truly relevant and useful?"

Most complex human actions involve a combination of factors. For example, we work because of the external pressure to earn money, and some also get an intrinsic reward in the form of achievement, self-expression or making a difference in the world. Both factors are important, and if one is missing, the other needs to compensate strongly for this. For example, interns working for free to get ahead quickly in their careers; people being paid more to stay in a difficult or unfulfilling job.

The success of your customer persona will depend on how carefully you interrogate assumptions about your customer, how carefully you draw on research, and how you prioritise understanding their motivations and the way decisions are made.

Decision making and behavioural economics

One significant shift in understanding customers over the past few years has come from the fields of psychology and economics. This area of inquiry, behavioural economics, looks at what assumptions or behaviours drive decision making. An understanding of individual motivations and interactions between customers and your brand can help you cater to what your market really wants or needs.

As an example, industrial designer Yogita Agrawal designed an innovative and much-needed human-powered light for people in rural India. Although the product ingeniously took advantage of the locals' mobile lifestyle – the battery is charged through the action of walking – and the idea was well received, initially no one actually used the product. Agrawal eventually discovered the simple reason for this, the device had a plain, ugly casing that did not match at all with the vibrant and colourful local dress. When she added a colourful and personalisable covering to the device, usage shot up dramatically. Although she had found the big insight, that walking can generate energy to power lights in areas not served by the electrical grid, it took a further understanding of regional customs to truly make the device appealing.

If marketers can apply this insight to their strategies and campaigns, it means that they may be able to get more customers to take desired actions more often, for less cost and effort. This is the ideal scenario for any business.

Biases

Cognitive biases

Cognitive biases are our own personal prejudices and preferences, as well as common ways of thinking that are inherently flawed. A classic example is confirmation bias, where we take note of information that confirms our beliefs or world view, but discount or ignore information that doesn't.

Try it for yourself! The next time you are driving or commuting, pay attention to all the red cars on the road. Does it begin to seem like there are more red cars than usual?

Below are some of the most important biases that marketers should be aware of taken from Psychology Today (2013).

Table 2.5.1

Category:	Bias:	Elaboration:

Information	Knee-jerk bias	Making a quick decision in a circumstance where slower, more precise decision-making is needed.
	Occam's razor	Assuming that an obvious choice is the best choice.
	Silo effect	Using a narrow approach to form a decision.
	Confirmation bias	Only focusing on the information that confirms your beliefs (and ignoring disconfirming information).
	Inertia bias	Thinking and acting in a way that is familiar or comfortable.
	Myopia bias	Interpreting the world around you in a way that is purely based on your own experiences and beliefs
Ego	Loss aversion bias	Tending to favour choices that avoid losses, at the risk of potential gains.
	Shock-and-awe bias	Believing that our own intelligence is all we need to make a difficult decision.
	Overconfidence effect	Having too much confidence in our own beliefs, knowledge and abilities.
	Optimism bias	Being overly optimistic and underestimating negative outcomes.
	Force field bias	Making decisions that will aid in reducing perceived fear or threats.
	Planning fallacy	Incorrectly judging the time and costs involved in completing a task.

Pricing bias

There is also a lot of bias around the price of an item. Generally, we perceive more expensive to be better, and we can actually derive more psychological pleasure from them, even if the cheaper alternative is objectively just as good.

A classic example of this is wine-tasting, where in repeated experiments participants agree that the more expensive wine tastes better where, in fact, all the wines were identical. Taken even further, however, researchers discovered that people tasting the more expensive wines actually had a heightened pleasure response in their brains, showing that researchers could generate more enjoyment simply by telling them they were drinking an expensive wine (Ward, 2015).

Loss aversion

One of the most powerful psychological effects is the feeling of loss, when something we possess is diminished or taken away. The negative feeling associated with loss is far stronger than the positive feeling of gaining the equivalent thing. In other words, we feel the pain of losing $200 more acutely that the joy of gaining $200.

Marketers can use loss aversion very effectively in the way they frame and execute marketing campaigns. Here is an example:Giving a customer a free trial version of a service for long enough that it becomes useful or important to them at which point they would be happy to pay to avoid losing it. On-demand TV service Netflix uses this to great effect with its 30-day free trial, especially since they ask for credit card details upfront so that shifting over to the paid version is seamless.

Heuristics

A heuristic is essentially a decision-making shortcut or mental model that helps us to make sense of a difficult decision-making process or to estimate an answer to a complex problem.

Some classic examples include:

- **The availability heuristic** – we overemphasise the likelihood or frequency of things that have occurred recently because they come to mind more easily.
- **The representativeness heuristic** – we consider a sample to represent the whole for example, in cultural stereotypes.
- **The price-quality heuristic** – more expensive things are considered to be better quality. A higher price leads to a higher expectation, so this can work both to the advantage and disadvantage of marketers. For products where quality is measurable and linear, the price needs to correlate, and a higher price needs to be justified tangibly. For products or services where

quality is less tangible or more subjective such as food, drinks, experiences and education, in many ways the price can heighten the perceived quality and experience even on a neurological level.
- **Anchoring and adjustment heuristic** – we make decisions based on relative and recent information rather than broad, objective fact. In marketing, this can be used to steer customers to the package or offer that the brand most wants them to take.

Choice

How do people choose? This is a difficult question to answer because people decide based on irrational, personal factors and motivators, objective needs and their immediate circumstances.

Word of mouth or peer suggestions

We are very susceptible to the opinions of other people, and tend to trust the opinions of friends, family, trusted experts and 'people like us' over companies or brands. We are also much more likely to join in on an activity like buying a specific product if we see others like us doing it first. This is the notion of social proof. Human beings generally rely on early adopters to lead the way, with the vast majority waiting for a new product or service to be tested before jumping on board.

This is why many brands use spokespeople or testimonials. They act as a reassurance to the potential customer that other normal people actually experienced the benefits that were promised. This also highlights the importance of positive online word of mouth. As you will learn when we discuss the Zero Moment of Truth, people do extensive research online before important purchases and can have their minds swayed by the reviews, experiences and opinions of others who are often strangers.

Personal preferences and history

Some of our decisions are based on very personal factors, such as a favourite colour, a positive past experience or a historical or familial association. For example, some people may choose to buy the same brand of breakfast cereal that they remembered eating as a child, regardless of the price or nutritional benefits. For them the total experience and good feelings form part of the overall value they derive. This is why many brands place emphasis on their long and prestigious histories.

Habits

In other cases, we buy the same thing because we've always bought it, and it's simply the easiest option.

Habits are typically triggered by an outside or environmental factor (the cue), which then causes us to act out our habit (the action) after which we receive a positive boost (the reward). This sequence is referred to as the habit loop.

In marketing, the goal is to get a customer to form a habit loop around purchasing or using the brand's offering. For example, many snack brands try to associate the environmental cues of hunger or boredom with their products such as Kit Kat's "Have a break" or Snickers' "You're not you when you're hungry" campaigns.

Loyalty programmes can play a key role in helping customers solidify a habit. For example, given the choice of two similar coffee shops on the morning commute to work, a person may be more inclined to visit the one offering a free coffee once they've collected a card full of stamps (even if that means going out of their way or paying a bit more for what is essentially a small discount). Eventually, the routine becomes set and it becomes easier to stick to the safe, familiar option.

Here are some examples from brands that encourage habit formation.

Table 2.5.2

Brand	Cue	Routine	Reward
Starbucks	Walking to work in the morning	Get my regular coffee order	A caffeine hit and a friendly interaction with the barista
Nike	Mobile app reminder to go for a run	Put on Nike shoes, go to the gym	Endorphins, satisfaction at living a healthy aspirational lifestyle

Movie theatre	Smell of popcorn	Buy a snack set from the counter	Tasty snack, experiencing the 'full' movie-going experience

How do habits form? To create a habit, you need to perform a repeated action many times in a row. The harder the action such as going for a jog each morning, the longer and more consistently you need to practice the behaviour. Once the habit sets, it becomes a mental 'shortcut' that will take conscious effort to override in future.

Decision load

Making decisions is hard even if the decision is a low-stakes, low-impact one. Generally, psychologists agree that we have a certain quota of decisions that we can make every day, after which subsequent decisions become harder and more taxing, and often result in poorer outcomes called 'decision fatigue'. This is why leading thinkers try to cut out as many trivial decisions as possible. Steve Jobs of Apple famously wore the same blue-jeans-and-turtleneck outfit every day to save himself making that one extra decision every morning.

This is also why we tend to subconsciously eliminate unnecessary decisions and stick to reliable, tested habits. This is especially true for the fast moving consumer goods (FMCG) sector. Consider your habits when buying toothpaste. Typically, you will purchase the same brand you always do without really thinking about it. Unless you had a terrible experience with the product, one toothpaste seems as good as the other and there's no incentive to switch. You certainly won't pause for five minutes in front of the shelf each time to carefully study each option before making your decision. It doesn't matter enough to get the best one.

Now imagine that your usual brand is out of stock. Suddenly, instead of relying on the existing habit, you are forced to make the decision from scratch at which point marketing factors and price can play an important role. But, crucially, it is the experience that the new product delivers that will be the deciding factor. If the new toothpaste is similar or inferior to the usual brand, there's no incentive to change the buying habit.

Defaults

Providing a 'default option' can be a powerful decision-making shortcut, because it removes the need to make an active decision. Defaults work for a number of reasons.

- **They offer a path of least resistance.** The default setting is perceived to be the one that is good enough for most people, and requires the least amount of thought and customisation. This is ideal for reducing effort.
- **They serve as a social signal.** The default is seen as the socially approved option, as the presumption is that the majority will choose this and there is safety in aligning with the majority.
- **They offer assurance.** Similarly, we also presume that the default choice has been selected by an expert because of its merit to the end user.
- **They take advantage of loss aversion.** When it comes to sales and marketing, effective default packages typically include more products or services that are strictly needed to increase the value and therefore the price. This is done simply because opting for a more basic version involves the customer taking elements away, and therefore suffering a loss. Once the default price has been anchored in the customer's mind, there is less incentive to remove unwanted elements, even if the price gets reduced. For example, when buying a new laptop, the customer may be offered a package deal that includes antivirus software, a laptop bag, a wireless mouse and other related accessories.

Choice architecture

You can simplify your customers' decision-making processes by cleverly designing the choices you offer. This is called choice architecture.

While the following are guidelines only, and should be tested thoroughly based on your own individual context, brand and customers, generally speaking a good choice architecture has the following characteristics:

- **A small number of choices, usually not more than five, though ideally three.** The smaller the number of options to choose from, the easier it is for the customer to distinguish the differences between the options, and to avoid a feeling of missing out.
- **A recommended or default option.** Because people consider expert advice and social preferences when choosing,

highlighting one option as ‘the most popular choice’ or ‘our top-selling package’ can direct people to the option you most want them to take.
- **A visual design hierarchy, typically using colour and size.** To make your preferred option stand out, one easy trick is to make it bigger and brighter than the options around it.

Mixpanel strongly emphasises its Business plan as the ideal choice, not only is it highly emphasised compared to the surrounding options, it includes a ‘best value’ assurance.

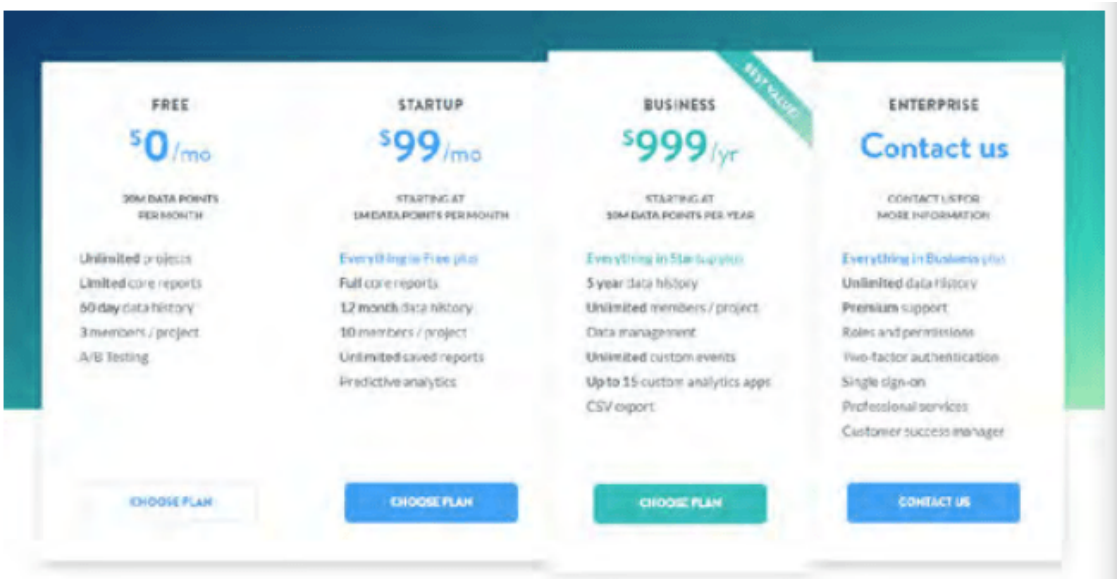


Figure 2.5.4: Mixpanel highlighting their Business option as the ideal choice *Screenshot, Mixpanel 2017*

Customer experience mapping

Once you have carefully crafted personas to guide you around who your customer groups are, you need to understand how and where they are engaging with your brand. This is where customer experience mapping comes into play.

A Customer Experience map visually identifies and organises every encounter a customer has (or could have) with your company and brand. These interactions are commonly referred to as “touchpoints”. (Kramp 2011)

You can use it as a tool to map your entire customer experience, or to drill down into detail for particular parts of that experience. Examples include in-store purchasing or someone trying to buy something on your website.

The map should detail how customers are feeling at various points in their interaction with you, and also highlight any pain points that they may be experiencing. Identifying these problems or dips in their experience presents opportunities for engagement, and also helps to explain your customer behaviour in context.

Towards creating your map



Figure 2.5.5: An experience map highlights opportunities for improving your customer experience *Permission from Mirum*

Customer experience maps should vary from business to business, so one shouldn't just follow a blueprint. Consider the customer journey introduced in Strategy and context, taking someone from consideration through to purchase and hopefully loyalty. The experience map looks at the progression from consideration through to post purchase in great detail and visually synthesises your customer's behaviour and motivations at every point of contact with your brand. Look at the example above, which includes some key sections:

- **Phase** – Where is your customer in their interaction with your brand?
- **Doing, thinking, feeling** – How does what they are feeling and doing vary from stage to stage?
- **Channels** – What channels or contact points are involved in facilitating this stage of their journey?
- **Opportunities** – What opportunities exist to solve pain points for your brand?

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2.6: Measuring success

The ultimate test of how well you understand your customers is evident in the success of your product or service. Targeted and relevant communications can only drive the sales of a relevant and well-positioned product.

Data on the success of your campaigns, from social media analytics through to site visits and customer service feedback, should both act as measures of success and feed into course correcting your marketing efforts or, where relevant, the nature of your actual product or service.

Every measure and data source discussed throughout the rest of this book should feed into your evolving picture of your customer. Personas and user experience maps should be living documents and tools

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2.7: Case study - Argos

One-line summary

Leading UK retailer Argos uses data analysis to deliver an overall year-on-year net margin increase of 170%.

The challenge

Argos wanted to increase the effectiveness of their budget and spending and increase revenue from paid search by 30%, without increasing the cost of sales.

The solution

Argos' marketing agency came up with a six part strategy to achieve this goal.

1. It used predictive analytics models to forecast optimised budget spend and expected revenue for each day, week, and month.
2. It aligned creative messages with stock and price changes to make sure the right ads were shown to the right people on the right device and at the right time.
3. It used a bespoke attribution model to measure the contribution that each click and keyword made to a sale.
4. It ran models to see how weather, location, seasonality, and other factors caused changes in customer buying behaviour, then synchronised campaigns to those changes.
5. It adapted the messaging, scheduling, and positioning of paid search ads to take advantage of expected traffic increases after the airing of a TV ad.
6. It changed the focus from revenue as a measure of success to profit as a measure of success, so instead of looking only at cost of sale, they examined net margin contribution to product sales.

By reviewing Google data, ROI targets, conversion rates, and transactional data, they were able to build predictions for keywords related to over 50 000 Argos products. Argos also used software to analyse data from customer buying triggers like location, weather, and TV ads.

Using this data, Argos and their marketing team was able to map season trends across all Argos products, including events like back to school, Argos catalogue launches, Easter, Christmas, and more. Using this data, they could anticipate customer demand and predict changes in impressions, clickthrough rate, cost per click, and conversion rate.

They used the same software to map weather-dependent products to weather-related digital campaigns for Argos, identifying the effects of temperature on each product all through the year. These seasonal and weather triggers were used in conjunction with daily weather forecasts for each region and store area to automate campaign adjustments and propose bid changes.

Finally, Argos aligned online marketing with TV ad broadcasts for both Argos and competitors, making changes in Google within seconds of an ad being broadcast. This enabled them to take advantage of people who use dual screens while watching TV.

Daily diagnostic reports were provided to identify and correct any underperforming campaigns.

Results

The marketing agency delivered a 170% increase year-on-year net margin increase across all product categories. The increase was over 100% in all categories, and in some categories as much as 900%. Other results included:

- Total annual revenue from search increased by 52% compared to the previous year
- PPC delivered a 46% increase on the previous year over Christmas
- Web traffic from PPC and Shopping increased by 33% on the previous year

- Cost of sales outperformed their target
- They lifted conversion rates and average order value
- The total number of orders via PPC increased by 31%. (Forecaster, n.d)

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2.8: The bigger picture

An understanding of your customer ties to absolutely everything you do in the marketing process. It should inform and drive strategy, and aid in matching tactics to outcomes.

Feedback on how well you've understood your customer can come from various digital channels, social media, conversion optimisation, CRM, data and analytics. While there are many sources of data, only when they are combined into a holistic picture can they help you get to the 'why' about your customers.

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2.E: Understanding Customer Behaviour (Exercises)

Case study question

1. Why did Argos need to use software for this campaign?
2. What kind of data was important for this campaign, and how was it collected?
3. What can you learn from the campaign's use of big data?

Chapter questions

1. What is behavioural economics?
2. What traps should you avoid when developing a consumer persona?
3. What is the relationship between a consumer experience map that maps your customers' entire journey, and an experience map used in the user experience design discipline?

Further reading

This presentation offers a good summary of the key topics and ideas within behavioural economics: www.slideshare.net/philipdemeulemeester/behavioural-economics-in

Eisenberg, B. and Eisenberg, J., 2006. Waiting for Your Cat to Bark Persuading Customers When They Ignore Marketing

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2.S: Understanding customer behaviour(Summary)

People have come to depend on and shape the digital channels that enable connection, individual interest and the disruption of industries. Your consumers are connected, impatient, fickle and driven by a number of motivations and contextual realities. Only through targeting and understanding specifically can you reach them and ensure the success of your brand.

Some tools can help you to paint a picture of your customers and their experience of your brand by depicting complex motivations, both external and internal. This enables real customer data and research, and considering the complex and sometimes irrational influences on how people make decisions. Customer personas, customer experience maps and the field of behavioural economics can all help to shape your thinking and drive your approach.

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3: THINK - DATA DRIVEN DECISION MAKING

Learning Objectives

In this chapter, you will learn:

- The importance of data in our data-driven world.
- What data you should be collecting.
- How data is used to improve the user experience and increase conversions.
- How knowing your customers is integral to improving their experience with your brand.

3.1: References

3.2: Introduction

3.3: Key terms and concepts

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3.6: Working with data

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3.8: Advantages and challenges

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3.E: Data driven decision making(Exercises)

3.S: Data driven decision making(Summary)

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3.1: References

Belarbi, M.A., n.d. Startup From The Bottom: Here Is How Uber Started Out. [Online] Available at: gulfelitemag.com/startup-bottom-uber-started [Accessed 30 October 2017]

Digital Training Academy, 2017. Mobile case study: Royal Canin runs “Offers Factory” for pets in Russia. [Online] Available at: www.digitaltrainingacademy.com/casestudies/2017/02/mobile_case_study_royal_canin_runs_offers_factory_for_pets_in_russia.php [Accessed 8 November 2017]

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Wnep.com Amazon’s ‘Dash Button’ Offers Ordering Convenience. [Online] Available at: wnep.com/2015/03/31/amazons-d...rite-products/ [Accessed 30 October 2017]

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3.2: Introduction

The strength of the decisions you make depends on the quality and completeness of the information that informs these decisions. This chapter will examine the role of data in delivering meaningful insights into connected, evolving consumers. Data can be used to change and adapt marketing strategies to better meet changing consumer needs. A dynamic view of data is necessary to create an extremely detailed, regularly updated picture of your consumers. This means that you need to be collecting data all the time, at every stage of the marketing process, to ensure that your view of the customer does not become obsolete.

Definition: The evolving consumer

'The evolving consumer' refers to the fact that people are constantly changing. People change on an individual level and are influenced by technology, the macroeconomic climate, financial stability, and a host of other factors that are always in flux.

A current, accurate view of the customer is essential for marketers because consumers expect to be addressed as individuals. You want to deliver targeted communication that reaches the right audience, at the right time, when they are displaying the right intent, to lead them to purchase your product. Data helps make this happen by providing an individual view of each consumer and helping with segmentation and targeting. Data will also show how well your campaigns are performing, enabling you to improve them and make them more effective. In short, data is used to make logical decisions based on real information to create a customer-driven, data-led business. It must be considered not only at the beginning of your engagement with marketing and digital, but throughout.

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3.3: Key terms and concepts

Table 3.2.1

Term	Definition
Business intelligence/ insights	Data that can help businesses understand the factors influencing their success and how these can be used to benefit them.
Connected customer	Consumers are increasingly connected, using ever-growing numbers of Internet-enabled devices. These offer opportunities for data collection.
Current indicators	Information from the present time that can help businesses to understand their customer and themselves.
Customer intelligence	The process of gathering and analysing information about customers to improve customer relationships and allow for more strategic business decisions.
Data intelligence	The process of gathering and analysing data from all available sources to improve customer relationships and make more strategic business decisions.
Disruption	When a disruptive innovation changes the market and displaces established players.
Dynamic data	Data that is constantly updated and evaluated to provide a dynamic, changing view of the customer
Future/leading indicators	Information that can help a brand to make decisions about the future.
Goals	Specific actions taken by a user, or specific user behaviour
Internet of things	The interconnection of everyday objects to the Internet via embedded computing devices, giving them the ability to send and receive data.
Key performance indicators (KPI)	The metrics that are examined to determine the success of a campaign. Lagging indicators Older data that gives information on how a brand performed in the past.
Metric	A quantifiable measure used to track the performance of a campaign. The most important metrics are called KPIs. Net promoter score (NPS) The KPI used to measure customer loyalty.
Segmentation	The process of breaking an overall audience or target market into smaller groups based on specific commonalities for more accurate targeting. Single view of customer Single view of customer is achieved when all customer information is available in a single central location.
SMART objectives	A marketing objective that is specific, measurable, attainable, relevant, and time bound.
Target	The specific value that a marketer wants a metric to achieve.

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3.4: Understanding data

Consumers, technology and data

To understand data and its role in a business, you need to understand consumers and their relationship to technology. Many people believe that technology changes and consumers adapt in response. Really, consumers are leading the change themselves through the technological choices they make. They decide which technology to embrace, usually favouring whatever facilitates speed and ownership of their own experience. This is particularly true on mobile.

Brands need to meet consumers in the technological spaces they have chosen. The consumer relationship with technology is about accessibility, theirs to brands and products, and brands' to theirs. This has shifted a large deal of power to the consumer.

This connection to technology offers many opportunities for marketers. Every new technology embraced by a consumer offers brands new ways to collect information about them. This leads to more granular segmentation and more targeted marketing messages.

The Internet of me

Consider the Internet of Things, which is the idea that more and more everyday objects are technologically enabled to send and receive data via the Internet. The information these objects transmit is, for the most part, related to the consumer using the objects rather than about the objects themselves. Consumers use this connected technology to communicate, create content such as social media posts, and consume and share products.

More than an Internet of Things, you can think of this as an Internet of 'Me'. 'Me' is the consumer, and the technology-enabled connection between objects and the consumer allows brands to access reams of data about consumers that they could never have considered a few years ago.

What is data?

Put simply, data is all the available information about your business. It includes information about your consumers, your products and their performance, your owned digital properties, and any other information that exists that might affect your business. The mountains of data that your business has access to is good for one thing: it helps you create a strong, data-driven business strategy that lets you connect with consumers and, ultimately, sell more products.

> Remember the difference between owned, earned, and paid coverage in the digital sphere? Your owned properties cover your websites, social media profiles, and anything else your brand controls. Read more about this in the Social media and strategy chapter.

The intention behind the collection and careful use of data is to create more value for your customers. Value can be defined as any means through which the brand delivers on its purpose. Whatever that value is, it needs to be something that customers actually want and that is relevant to them. Data can help you identify what is relevant and useful and what really works.

Forms of data

There are four main forms of data relevant to brands:

1. **Algorithmic intelligence –** the algorithmic methods used by companies such as Google and Netflix to help drive revenue. In the case of Google, to assess what people want to read, and in the case of Netflix, to assess what they want to watch.
2. **BI: Business intelligence –** the technology-driven process for analysing an organisation's raw data, about profits and performance, and presenting that information to help brands make better informed business decisions.
3. **CI: Customer intelligence –** information derived from customer data, that comes from internal and external sources, to build better customer relationships and make stronger strategic decisions.

4. **SI: Software intelligence –** software tools and techniques used to mine data for useful and meaningful information, the result of which is similar to BI.

By combining all four forms of data, you could say that you are using data intelligence (DI), and this can easily make you the most powerful brand in your field.

Sources of data

Data can come from any number of sources, particularly thanks to the Internet of Things. You don't need to restrict yourself to website-based analytics. To get a full picture of audience insights, try to gather as wide a variety of information as you can. Some places to look:

Note

Take a look at this video on the Internet of Things , how it works, and what we can do with the data: https:// www.youtube.com/watch?v=QSIPNhOiMoE.

- **Online data –** everywhere your audience interacts with you online, such as social media, email, forums and more. Most of these will have their own datagathering tools. For example, look at Facebook Insights or your email service provider's send logs.
- **Databases –** look at any databases that store relevant customer information, like your contact database, CRM information or loyalty programs. These can often supplement anonymous data with some tangible demographic insights.
- **Software data –** data might also be gathered by certain kinds of software, for example, some web browsers gather information on user habits, crashes and problems. If you produce software, consider adding a data-gathering feature (with the user's permission, of course) that captures usage information that you can use for future updates.
- **App store data –** app store analytics allows companies to monitor and analyse the way customers download, pay for and use their apps. Marketplaces like the Google Play and Apple App stores should provide some useful data here.
- **Offline data –** in-store experience data, customer service logs, in-person surveys, in-store foot traffic, and much more.

You should consider looking for data in unusual places or consuming data in an unconventional way.

Example 3.4.1

Amazon Dash is an excellent example. Amazon Dash is a Wi-Fi-connected service that reorders products with the press of a button. It consists of three components.

1. A scanning device used to inventory consumer goods in a house.
2. The Amazon Dash Button, which can be placed anywhere in a house and programmed to order products of the consumer's choosing.
3. The Amazon Dash Replenishment Service, which allows manufacturers to add a button or auto-detection capability to their devices.



Figure 3.4.1: Amazon Dash *Adapted From Wnep, 2015.*

Consumers see this as a brilliant innovation that gets them the product they want, when they want it. They see it as being about convenience, and it is! As an example of incremental innovation, it stands out, and convenience will drive the use of the product. It is also an excellent data collection tool that helps to gather data for granular segmentation. This is good for both the customer and the brand.

Lagging, current, and leading indicators

Your data-driven, customer-first strategy should be built around three data indicators.

1. **Lagging indicators** are past data such as financial results, sales history and past campaign results. Profits can be seen as a result of your marketing efforts and how you responded to the competition. These indicators are important because they show your past performance, but they are only one part of the whole.
2. **Current indicators** are pieces of information from right now. For example, you can use website analytics to see what customers are doing on your site and which pages they visit. You can use this data to segment around that. The immediate environment is also a current indicator, for example, the #deleteuber hashtag was a huge current indicator for the Uber group about how their customers were reacting to their political actions. Current indicators can encourage you to think about what you can do to be agile in response to them.
3. **Leading** or **future indicators** help you think about where the company might be headed. Your brand can make a strategic decision about where you're going to be in the future. Look at other brands that are already established in that area, and examine what people search for in that space. What words do they use in their searches? What ideas are they looking for? What kind of innovations are coming out now that may affect the way your brand does business in the future? Is there any economic or environmental data that could affect how your brand performs? Future indicators help you define your strategy for moving the business forward.

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3.5: Approaching data

Enabling dynamic data

Consumers today expect increasingly personalised communication from brands. Personalisation is all about relevance. You can only successfully communicate with and add value to a customer if you understand who they really are. The only way you can do this is through dynamic data.

Many businesses make the mistake of not collecting and storing their data in a single place that can be accessed by everyone. For example, the sales department might have a list of qualified leads, the marketing department might have customer reactions to marketing material, and the CRM department might have access to customer complaints. Multiple data sets within a business pose a risk to customer communication, especially where they lead to irrelevant or outdated information being shared with customers.

Businesses should aim for a single view of customer (SVOC). This is when businesses have one view of customer data, which is all collected in one place and can be accessed by different departments. However, SVOC on its own is insufficient in today's data-rich environment. A SVOC is important as a starting point for storing clean data, but because it is collected at a single point in time, it doesn't account for customer change.

> Note
>
> Read more about the importance of database hygiene (keeping data fresh) in the Customer relationship management and Direct marketing: Email and mobile chapters.

Because customers are evolving in the way that they use technology and how they consume products, businesses need to evolve their approach to data to keep up. What is relevant to a customer today might be completely different to what was relevant yesterday. For example, customers listed on the database as married may now be divorced, and customers listed with certain political or product preferences may well change these preferences over time. Businesses need to move away from master data focused on a SVOC and toward dynamic data that keeps this evolution in mind.



Figure 3.5.1: Customer experience and data work hand in hand *Adapted From Unknown, n.d.*

As an example, consider a student living away from home, who is provided with a credit card by her father. A SVOC would result in sending marketing material to the father who signed up for the card, when a more dynamic view would take into account who is actually doing the shopping and send the material to her instead.

Data and customer strategy

A data-driven view of the customer allows a business to move from organisationcentric to customer-centric thinking.

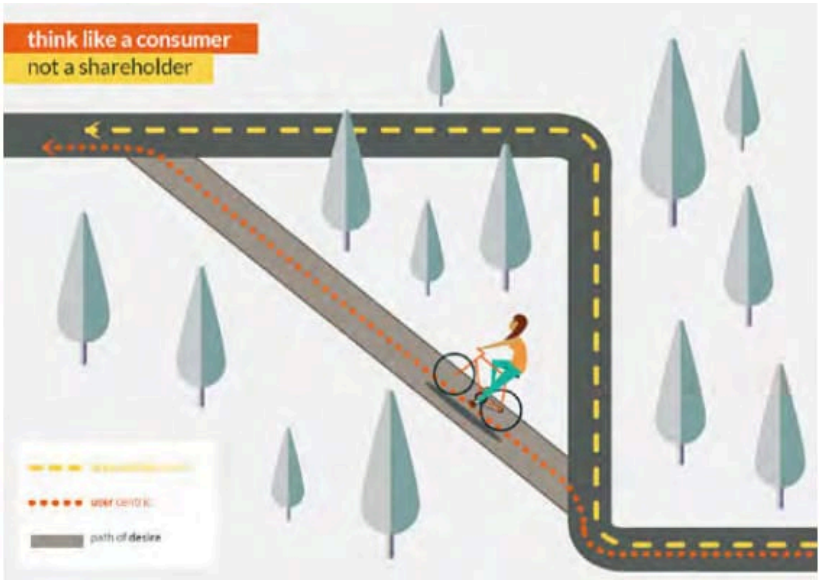


Figure 3.5.2: The difference between thinking like a shareholder and thinking like a consumer

A customer-centric brand will use these five principles in their customer strategy:

1. **You are not the customer.** No members of staff should presume to know what customers will like or want. No one person's hunches or intuition will be as accurate as a large data set. Use research and data to understand what your customers will like and how they will act accordingly.
2. **Your brand does not know the customers as well as they know themselves.** The brand should understand their customers, realise that the customers are changing, and be willing and able to use data to track and respond to that change.
3. **Customers are all different:** broad segmentation is the same as generalisation. With the amount of data available, brands are capable of very granular segmentation so instead of talking about "All women between 18 and 30 who use makeup", they can narrow it down to "Women between 18 and 30 who use makeup, are interested in X and Y, who like to consume Z, and who are friends with A and B."
4. **Customers are constantly changing.** Dynamic data is essential to ensuring your view of your customer is accurate and relevant.
5. **Data drives the customer-centric view.** You cannot give your customers what they want unless you know what that is and who they are.

> When thinking about different customers using the same type of product, consider makeup brands like MAC and Rimmel. Both brands would target women aged 18–30 years old who wear makeup. However, these brands differ in what their respective customers want from their makeup, what they are willing to pay, what skincare benefits they expect, where they socialise, and what jobs they may have. The more detail you have about your customers, the more you are able to set your brand apart and create marketing messages that speak to individuals.

In a customer-first strategy, dynamic data means creating that never-ending feedback loop we've looked at, of experience out and data in. Everything you do should push out an experience for the customer, and your customer expects that experience to be relevant, personalised, and built for them but in a way that's not too obvious. Larger, established companies may find it difficult to carry out this major shift in thinking to a customer-first approach, which puts new businesses at an advantage.

Data and trust

Consumers are increasingly concerned about privacy. To comfortably share with you the data you need, consumers must believe you will treat that data responsibly and respectfully. Any brand collecting data about its consumers, which should be every brand,

needs to work on establishing and maintaining this trust. Trust has three components:

1. **Security:** You need to make sure that you can protect customer data from being hacked or stolen.
2. **Privacy:** You need to ensure that your brand is compliant with legal requirements regarding what data it is and is not allowed to be collected and what it is allowed to do with that data. You should have a privacy policy outline that is easily accessible to the consumer.
3. **Transparency:** Give consumers insight into how their data is being used. Demonstrate how providing access to their data is contributing towards improving their experience.

Once you establish trust with a consumer, that trust can become a bond that leads to a relationship. The more trust you have, the better the relationship will be. However, if you break the trust by overstepping your bounds in personalisation, spamming the customer, or not keeping their data safe, they will go elsewhere

> Different countries will have different legislation around what brands need to do to protect consumer information, such as the European Union Data Protection Directives of 1995, South Africa's POPI (Protection of Personal Information Act) of 2013, or Canada's Personal Information Protection and Electronic Documents Act (PIPEDA). Make sure you are compliant with the laws of the country in which you operate.

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3.6: Working with data

Reporting

The process of becoming a customer-centric organisation does not end with gathering data. You need to report on that data to the people who will act on it, in a format that will actually be consumed. For example, if you give everyone a 27-page financial report filled with spreadsheets and nothing else, very few people will read or try to interpret it.

You need to consider your audience: who is going to receive your data, and what format works best for them? The marketing team would receive different data to the managerial team, who would receive different data to the sales team, and so on. Make the data available, but communicate only what is relevant to that audience to facilitate their path to taking action.

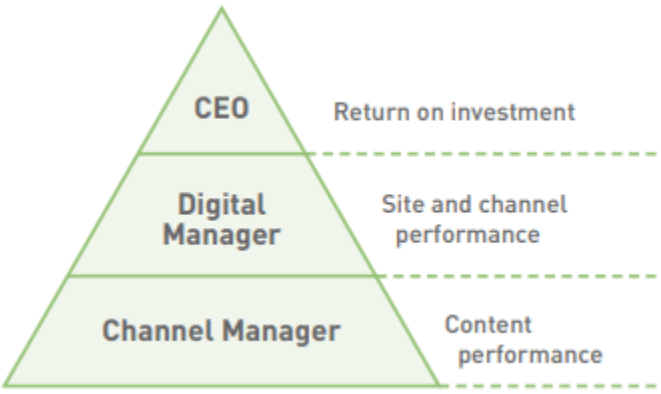


Figure 3.6.1: The reporting pyramid. Examples of who needs to see what aspect of website analytics data

Ideally, and while acting within the bounds of legal requirements, your organisation should place no restrictions on who can or cannot see existing data. Everyone in the company should have access in order to facilitate improvements. Make the data available to customer-facing staff as well as product designers, for example.

Why is this so important? Why does every part of the organisation need access to the data you are giving them? Data takes the emotion out of decisions, moving the organisation toward a customer-centric viewpoint. Managers can no longer say, “I’m experienced in this field, so I know what to expect” because opinion no longer matters. Instead, look at what the data is saying to drive your personalisation strategy and deliver relevant customer experiences.

Analysing data

The data feedback loop should never stop after a report. If you want to be agile, you need to consume, interpret, and understand data and turn it into an effect that will result in an immediate reaction.

You can read more about analysing data in the Data analytics chapter. For now, remember that the goal of analysing your data is to look for patterns such as similarities, trends, deviations, and any other relationship, and thinking about what those mean. This process can help you solve problems both on a small scale, at the level of websites and campaigns, and on a larger business-wide scale that you may not have realised you had.

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3.7: Becoming a data led organisation

The journey to becoming a data-led organisation is not an easy one, particularly for an already established business. Where would this change happen in how data, and its impact on the customer, is viewed?

A data-driven business needs to involve people who obsess about data and cultivate an organisational culture that puts data and the customer first. The organisational design that enables this data-first approach would look something like this:

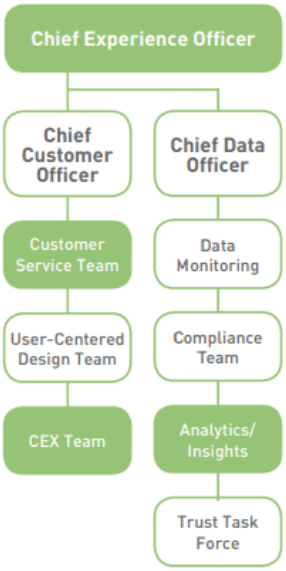


Figure 3.7.1: A variation of the organisational design required to combine a focus on data and customer to build a relevant customer experience

The journey should follow certain steps. These steps don't all have to happen in the same order, but they do tend to focus on three different areas.

Internal preparation

First, you will need to internally prepare your organisation for a data-first, customerdriven view. The very first thing your organisation needs to do is understand and **validate the financial and emotional investment** the company must make to deliver this new approach (investment in technology, hardware, people, and change management). Then, you will have to:

- **Gather and analyse collective data** to discover how and where your customers are connected (what channels and with what devices).
- **Appoint a cross-functional team** to champion the Customer Experience strategy. This requires customer officers to evaluate customer experience and data officers who can assess your current back-end architecture and data storage. Remember, you need the right infrastructure to support dynamic data storage and use.
- **Architect the best toolset** that supports your existing platforms to drive and support the changing customer experience. Remember to consider the kind of reporting you'll need to do.
- Consider the three **components of trust** – security, privacy, and transparency – and put people and processes in place to monitor this.

Customer focus

Second, your organisation will need to start moving toward actually analysing the customer and making their experience with your brand a better one. This means you need to:

- Identify **granular segments** within your user base.
- Update your **consumer engagement processes** and governance strategy accordingly.
- Shift toward a world where **every customer has a unique view of your product**.
- Start **mapping relevant user journeys** that leverage new channels of access to the consumer.
- Use the collective data to map the journey.
- Consider customer touchpoints and feedback loops.
- Use the data in part of the feedback loop to **map the change** in the customer journey.

External evaluation

Finally, you need to keep an eye on what is happening outside your business that could have an impact on it. This means you should:

- **Evaluate competitors** for their use of data influencing their personalisation strategies.
- Identify **emerging technologies** that could drive your incremental/disruptive innovation strategy.

A focus on data will impact and improve every aspect of your organisation, not only your marketing efforts, so start your journey now.

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3.8: Advantages and challenges

The advantages of a data-driven organisation are enormous. It:

- Drives a customer-centric focus
- Enables innovation in highly competitive markets
- Improves ROI on campaigns and other marketing efforts
- Allows for tactical decisions
- Means no opinions are involved as it is evidence-based decision making.

However, one cannot simply decide to be data-driven and have everything work out immediately. To be data-driven you:

- Have to be data-driven in **everything**, no picking and choosing.
- Have to persuade the entire organisation to adopt this mindset.
- Need to set up an organisational structure that will enable data to flow easily.
- Have to invest in the cycle and you need to invest in data to apply the insights that will help you get more data.
- Need to keep in mind that the huge amount of data available can make finding meaningful patterns tricky.

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3.9: Measuring success

Success should primarily be measured against your objectives. Gathering an idea of the total economic value of your online efforts can be difficult, but you can do it by examining the following, among others:

Site measures

- Audience behaviour statistics (measuring new against returning customers)
- Audience (unique users, page impressions, bounce rates, and visit duration)
- Frequency and engagement
- Conversions across all channels.

Sales

- Net sales
- Average order value
- Gross or median order value
- Customer acquisition rate
- Customer retention rate (remember, a retained customer is worth three to five times more than a once-off customer, and it is cheaper to retain existing customers than to acquire new ones)
- Offline sales as a result of online drivers (if someone visits the website or sees an ad online and then walks into the physical store, think about how you can measure this).

Services

- Retention
- Acquisitions.

Technical performance

Measuring your technical performance is important to ensure that your customer has a good experience on your online properties and will return. You should always have goals for how you want the user to experience the website, considering elements such as:

- Site maintenance, speed and performance
  - Time per page load (average should be 3 seconds)
- Capacity and reach
- IT services support
- SEO.

Remember, your user will give you three to four seconds of engagement time on a landing page and seven seconds on a homepage before they leave if you haven't answered their question, so make sure you know what the user wants and how to give it to them.

Operations

- Order processing time (an improvement on this based on digital technology is a contribution of online to the business, and it should be counted as a success)
- Fulfilment rates
- Substitution (if a product isn't available, how successful are you at substituting a different one?).

Marketing

- Campaign results against set objectives
- Customer loyalty NPS.
- Channel optimisation
- Customer surveys.

The idea of benchmarking can cause some confusion for brands wanting to measure their success. While industry benchmarks for things like marketing campaigns can be useful for seeing your standing in your industry, you should really be benchmarking against your own previous performance to ensure that you are always improving as a brand.

On the other hand, harder, more technical aspects of your digital performance should absolutely be measured against universal standards. Page load times have a measurable effect on SEO and customer engagement, so although decreasing your time from twelve to eight seconds is a good effort, you would still be well above the expected three seconds, and this will impact your site's overall performance in multiple areas (Hobo, 2017).

Note

Uncertain how to measure customer loyalty? Take a look at this article on the net promoter score (NPS), which is the KPI used to measure this: blog. emolytics.com/kpi/ net-promoter-scorecustomer-loyalty.



Figure 3.9.1: Longer load times increase page abandonment *Adapted from Hobo, 2017.*

The time you take to respond to consumers or to make a sale should be measured against universal benchmarks for similar reasons. That is, consumers have come to expect a certain standard in some areas, and anything not meeting this standard will result in a negative customer experience.

Each chapter in this book will give you an indication of the kind of metrics you should look at to determine success in particular areas.

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3.10: Tools of the trade

Many tools exist to help you make the most of your data!

Customer insight tools can help you find out more about your customers and what they think of you. These are tools that help you with online reputation management (ORM). For example:

- Google Alerts: www.google.com/alerts
- Hootsuite: hootsuite.com
- BrandsEye: www.brandseye.com

Data gathering tools:

- Google Analytics: analytics.google.com/analytics/web
- Quantum Leap Buzz: www.quantumleapbuzz.com
- Wolfram Alpha: www.wolframalpha.com

Data visualisation tools:

- ClickView: www.clickview.com
- Plotly: plot.ly
- Tableau: public.tableau.com/s
- Open Refine: openrefine.org
- Fusion Tables: support.google.com/fusiontables/answer/2571232

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3.11: Case study - Royal Canin Russia

One-line summary

Royal Canin used existing data to create personalised email coupons and local offers tailored to individual subscribers, tapping into the love pet owners have for their unique animals.

The challenge

Royal Canin's customer database was very outdated, and most people still bought their products in stores rather than online, a more efficient channel. Loyalty programmes for pets were usually seen as retailer initiatives rather than giving the brand recognition for these.

They wanted to create a loyalty programme that would encourage an image of Royal Canin as an expert in the field of pet food, across different breeds and it wanted to establish a relationship with consumers that would cause them to buy their pet food directly from the brand rather than at stores.

The solution

Royal Canin targeted dog and cat owners in the top six Russian cities, regardless of breed. They ran an algorithmic analysis of their CRM platform so that they could segment their audience and send offers according to:

- Type of pet
- Size of pet
- Upcoming 'events' such as a birthday or growth stage
- Medical records and any other data they had on the pet owner.

They could then send personalised email coupons to owners with deadlines for redemption. The unique link in the coupon would send the owner to a page already populated with a list of products chosen specifically for their pet, where they could place an order without leaving the platform. The online orders also facilitated brand communication by connecting pet owners to special events and programmes in various cities.

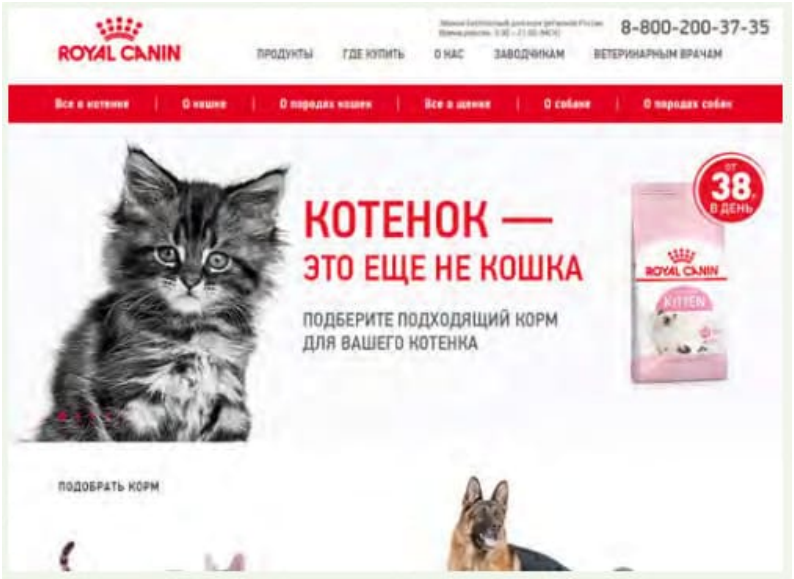


Figure 3.11.1: Royal Canin Russia's homepage *Adapted from Screenshot, RoyalCanin Russia 2016*

Customers could choose whether they wanted the food delivered to their home or whether they wanted to pick up their merchandise at a store near them.

Data from the mailed coupons was loaded into the CRM database, including whether the recipient used the coupons they were sent. The regular database updates helped the team assess a customer's level of involvement with the platform.

It also affected the everyday aspects of the business. Based on coupon redemption and other information gleaned from the campaign, the brand could adjust the availability of items in online and offline retail platforms according to demand. It also gave them the data needed to understand how much inventory they needed for different products based on their popularity.

The results

The campaign was a resounding success. Because of the data-focused approach, Royal Canin:

- Reduced logistics costs
- Minimised waiting time for orders
- Improved the customer experience
- Showed the customer that the order was implemented by the brand and not a retail store
- Created an adaptive platform for mobile orders after finding that 80% of recipients opened the initial offer on mobile.

The campaign also worked very well for consumers.

- Push SMS messages sent using geolocation helped monitor special offers at retail stores. Subscribers in the area could then receive unique promotional codes to redeem at those stores
- 65% of respondents opened the campaign messages
- 74% of those who opened the message went to the online ordering platform
- 46% of orders implemented coupons
- 75% of customers participating in the programme said they used Royal Canin food for their pets.

(Digital Training Academy, 2017)

You can view the video for this campaign here: www.digitaltrainingacademy.com/casestudies/2017/02/mobile_case_study_royal_canin_runs_offers_ factory_for_pets_in_russia.php

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3.12: The bigger picture

Data driven innovation

The view of data and its place in a business is evolving, but it is still lagging behind where it needs to be. Data tends to be focused on customer intelligence (CI), which includes customer profiling, or business intelligence (BI), which includes transactional behaviour. Businesses use these to decide what to do next. Some businesses are forward thinking and combine the two so that they have two different indicators of what the consumer might need.

CI and BI are the bare minimum of what businesses should be doing with data. Consider the notorious example of Target, a U.S. retailer that used data about customer shopping habits to send relevant marketing material to their customer. One father of a teenage girl complained to the store about sending his daughter coupons aimed at pregnant women. A short while later he apologised after discovering that his daughter was indeed pregnant (Business Insider, 2012).

That Target knew the teenage girl was pregnant is impressive. If they had combined CI and BI, they would have realised that they were about to market pregnancy-related products to a teenager. They could have avoided a great deal of embarrassment!

Both BI and CI are lagging indicators, data that the brand has collected about the past behaviour of consumers and the past performance of products. Many businesses only look at data with this traditional view, but it can tell us much more. A business that focuses on how to collect and analyse data can predict future customer behaviour, work on forward-path product development and improve personalisation.

Technology-enabled innovation is all about the customer experience. If the customer enjoys their experience with your brand, no matter what the product, they will keep using it. If your product is connected to the Internet, you can gather customer data that will further inform your product development. This creates a feedback loop in which you gather data, improve the customer experience, and gather more data, and so on.

Withings, a brand connected to Nokia, has created a weight scale that connects to a database, tracks your weight on a graph, and feeds it back to you in an app. The app can also connect to Withings' other lifestyle devices such as smartwatches and blood pressure monitors. This gives the user a lot of useful data, but it's also a great way for the company to collect data about its customers.

Any object that is both connected and information-intensive has the capability to do things in new and different ways, in other words, to disrupt.

Technology-enabled innovation should focus on the customer experience and should be data-led. It comes in two forms:

- **Incremental innovation** – doing things better in your everyday business practice to improve your customer's experience.
- **Disruptive innovation** – positioning your business for future customers.

Both are equally important. Incremental innovation is sometimes downplayed, but changing one small thing might have a big impact on how your customers perceive your brand. People often associate 'innovation' in a business context with innovation labs, or assume that it belongs to an innovation team and is someone else's problem. However, when you have a data-driven customer experience, because you have such a thorough understanding of where your customer is and who they are, a tiny incremental innovation plan can fundamentally change your customer experience.

Disruptive innovation is about positioning your business for the future customer. It refers to big changes that will change how customers interact with your business (and possibly your whole industry), and it generally ends up displacing whatever technology preceded it. For example, cell phones have almost replaced landline phones. For innovation to be relevant to your consumer, you need the right data.



Figure 3.12.1: The data feedback loop

An obvious example of a brand that did this, and in turn completely disrupted an industry, is Uber. They saw people struggling to find taxis and a lot of people who owned cars not driving them (Belarbi, n.d.). They then thought about how to add technology to bring the two together, took a map (information), added a layer of connection (person to person), and invented an app that has almost toppled traditional taxi brands. Uber used already existing GPS technology to solve a problem in a way no one had considered before.

Uber also uses incremental innovation by regularly rolling out updates to its app and services that will positively affect customer experience. For example, Uber noticed that many potential customers in their South African locations did not have access to a credit card, so they piloted experiments with cash payments in that country.

Think about how Uber gathers the data it needs to make these incremental improvements. They receive a huge amount of data every time someone uses their app. Updates of where people are going, their most frequently visited locations, times of day during which travel takes place, and more. This kind of data-first thinking allows them to provide more value to customers, track their improvements and thus establish a powerful data feedback loop.

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3.E: Data driven decision making(Exercises)

Case study questions

1. What role did data play in the planning and execution of the Royal Canin campaign?
2. Why was it so important for Royal Canin to continuously monitor the campaign results and update their CRM database?
3. What beneficial effects did the data generated by the Royal Canin campaign have on the running of the business overall?

Chapter questions

1. Why should a business try to be data-driven?
2. What should be done with data once it has been collected?
3. What are some of the most important sources of data?
4. What are some up-and-coming data collection tools/sources that you foresee being useful in the near future?

Further reading

Personalisation is important for great customer experiences, but read about how this might be a problem for small businesses here: adage.com/article/digitalnext/personalization-a-problem-brands/305554

Check out the Kissmetrics blog for articles about analytics and testing: blog.kissmetrics.com

The Analytics Vidhya blog has some more complex data information: www.analyticsvidhya.com/blog

Take a look at the Freakonomics blog: freakonomics.com

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3.S: Data driven decision making(Summary)

The more data you collect, the more relevant you can make your customer experience. Relevance leads to a better customer experience, which leads to more opportunities to collect data. A customer-focused, data-driven organisation needs to embrace this cycle, which enables both incremental and disruptive innovation.

Businesses need to embrace dynamic data that enables them to keep a clear view of their evolving customer. This data strategy should be built around lagging, current, and leading or future indicators, each of which can give you a different piece of the data puzzle. If this happens, the business will have a clear view of past and current performance as well as where they can go in the future.

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4: THINK - MARKET RESEARCH

Learning Objectives

In this chapter, you will learn:

- Key concepts in conducting market research.
- Several methods for conducting online research, including surveys, online focus groups and data sentiment analysis.
- Possible problems and pitfalls to look out for when researching online.

4.1: Introduction

4.2: Key terms and concepts

4.3: The importance of market research

4.4: Key concepts in market research

4.5: Online research methodologies

4.6: Justifying the cost of research

4.7: References

4.8: Tools of the trade

4.9: Adantages and challenges

4.10: Case study - Sentiment data mining predicts political outcomes

4.11: The bigger picture

4.E: Market Research(Exercises)

4.S: Market Research(Summary)

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4.1: Introduction

The Internet is built for research. Whether it's a consumer shopping around for prices, a researcher exploring a topic or a fan looking up their favourite band, the Internet has provided new ways for gathering and analysing data.

Customers are able to research companies and products easily, gathering information to compare prices and services with a few clicks. Customers are also able to share likes and dislikes easily, whether that information is shared with companies or with friends.

As a result, brands can study who their customers are, what they are interested in, how they feel about the brand, and the best times and places to engage with them. Insights can be gathered from ongoing market research, making it possible to course correct and apply data driven decision making. This chapter will focus on tools and methodologies for gathering useful data.

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4.2: Key terms and concepts

Table 4.2.1

Term	Definition
Bounce rate	The number of people who view one page and then leave a website without viewing any other pages. Data statistics and facts collected for analysis.
Data sentiment analysis	The systematic analysis of subjective materials, such as survey responses or social media posts, in order to determine the attitude and intended emotional communication of the customer
Focus group	A form of qualitative research where people are asked questions in an interactive group setting. From a marketing perspective, it is an important tool for acquiring feedback on new products and various topics.
Hypothesis	A supposition that is tested in relation to known facts; a proposition based on reason but not necessarily assumed to be true.
Listening lab	A testing environment where the researcher observes how a customer uses a website or product.
Observation/ online ethnography	When a researcher immerses themselves in a particular environment in order to gather insights.
Primary research	The collection of data to present a new set of findings from original research.
Qualitative data	Data that can be observed but not measured. Deals with descriptions.
Quantitative data	Data that can be measured or defined. Deals with numbers.
Research community	A community set up with the intention of being a source for research.
Research methodology	Methods employed in research for reaching results
Sample size	The number of respondents in a sample of the population.
Secondary research	The collection of existing research data.
Sentiment	The emotion attached to a particular mention which is positive, negative or neutral.
Statistically significant	A sample that is big enough to represent valid conclusions.

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4.3: The importance of market research

The modern world can feel unpredictable. It is increasingly difficult to keep up with trends, customer needs, popular opinions and competitors. So, how can you keep your brand and products relevant to ensure you are meeting your customers' needs?

The answer is to conduct market research. Market research helps you make informed business decisions. It involves systematically gathering, recording and analysing data about customers, competitors and the market, and turning this data into insight that can drive marketing strategies, product design and positioning and communications strategies.

Online market research is the process of using digital tools, data and connections to glean valuable insights about a brand's target audience. In other words, it's the process of learning about your audience by engaging and observing them online. Technology plays a key role in gathering data and connecting with research participants, and can make the whole process quicker and easier to manage than traditional offline research methods.

Traditional and online market research have the same goals and underlying principles, but online market research has the benefit of using digital technology, which provides a range of benefits.

- The Internet is always on, meaning that data is readily available at any time.
- Many of the processes for finding, gathering and storing data can be automated. For example, you can get an automatic email alert if someone mentions your brand, or you can set up self-administered digital surveys.
- You have access to a large number of participants around the world at the click of a button. A lot of the information you will use is already being automatically collected such as web analytics and social media data all you need to do is access it.

> **Note**
>
> Remember that comments made on social networks cannot represent the views of your entire target market. The validity of any data must be considered in light of your research design.

People are often happy to share their own research, insights and methodologies online, so you can access this trove of resources to inform your own research.

Online market research can be much more cost effective and quick to set up than traditional research techniques.

There are many reasons why you should conduct regular market research:

- To gain insights into your consumers, this can include:
  - What customers want and need from your brand
  - What customers like and dislike about the brand
  - Why customers buy the brand's products or services
  - Why potential customers might choose your brand over another
  - Why (or why not) customers make repeat purchases
- Understand the changes in your industry and business
- Discover new market trends on which you can capitalise
- Find new potential sales avenues, customers, products and more
- Find and engage new audiences
- Allow customers to help steer your business.

If you are able to understand your customers and the greater business context, you will be able to market more effectively, meet their needs better, and drive more positive sentiment around your brand. All of this adds up to happier customers and, ultimately, a healthier bottom line.

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4.4: Key concepts in market research

While the research field can be full of complex terminology, there are four key concepts to understand before conducting your own research:

1. Research methodology
2. Qualitative and quantitative data
3. Primary and secondary research
4. Sampling.

Research methodology

Research methodology refers to the process followed in order to conduct accurate and valuable research. The research process should involve certain steps.

1. Establish the goals of the project
2. Determine your sample
3. Choose a data collection method
4. Collect data
5. Analyse the results
6. Formulate conclusions and actionable insights (for example, producing reports)



Figure 4.4.1: The steps in research methodology process

Most often, market research is focused around specific issues unique to a business or brand. It is therefore not always possible to freely obtain comparable information to aid decision making. This is why it can be useful to start from a specific research problem or hypothesis when kicking off a research project. Your research question should guide your entire process, and will determine your choice of data collection method. We will discuss more on those later.

Another approach involves ongoing data collection. As discussed in the Data driven decision making chapter, unbiased decision making is far more accurately driven when aided by market insight. Many have argued that less expensive, ongoing data collection is increasingly a route proven to be useful to organisations.

Primary and secondary research

Research can be based on primary data or secondary data. Primary research is conducted when new data is gathered for a particular product or hypothesis. This is where information does not exist already or is not accessible, and therefore needs to be specifically collected from consumers or businesses. Surveys, focus groups, research panels and research communities can all be used when conducting primary market research.

Secondary research uses existing, published data as a source of information. It can be more cost-effective than conducting primary research. The Internet opens up a wealth of resources for conducting this research. The data could have originally been collected for solving problems other than the one at hand, so they may not be sufficiently specific. Secondary research can be useful for identifying problems to be investigated through primary research.

The Internet is a useful tool when conducting both primary and secondary research. Not only are there a number of free tools available when it comes to calculating things such as sample size and confidence levels (see section 4.7 on Tools of the trade for some examples), but it is also an ideal medium to reach large numbers of people at a relatively low cost.

The Internet and secondary research

Research based on secondary data should precede primary data research. It can be used in establishing the context and parameters for primary research.

Secondary data can:

- provide enough information to solve the problem at hand, thereby negating the need for further research.
- provide sources for hypotheses that can be explored through primary research.
- provide information to inform primary research, such as sample sizes and audience.
- used as a reference base to measure the accuracy of primary research.

Companies with online properties have access to an abundance of web analytics data that are recorded digitally. These data can then be mined for insights. It's worth remembering, though, that it's usually impossible for you to access the web analytics data of competitors so this method will give you information only about your own customers.

Customer communications are also a source of data that can be used, particularly communications with the customer service department. Committed customers who complain, comment or compliment are providing information that can form the foundation for researching customer satisfaction.

Social networks, blogs and other forms of social media have emerged as forums where consumers discuss their likes and dislikes. Customers can be particularly vocal about companies and products. This data can, and should, be tracked and monitored to establish consumer sentiment. If a community is established for research purposes, the resulting feedback is considered primary data, but using social media to research existing sentiments is considered secondary research. The Internet is an ideal starting point for conducting secondary research based on published data and findings. With so much information out there, it can be a daunting task to find reliable resources.

The first point of call for research online is usually a search engine, such as www.google.com or www.yahoo.com. Search engines usually have an array of advanced features, which can aid online research. For example, Google offers:

- Advanced search: (http://www.google.co.za/advanced_search?hl=en)
- Google Scholar: (http://scholar.google.co.za/schhp?hl=en)
- Google Book Search: (http://www.google.co.za/books?hl=en)
- Google News Archive: (http://news.google.com/newspapers)

Many research publications are available online, some for free and some at a cost. Many of the top research companies feature analyst blogs, which provide some industry data and analysis free of charge.

Some notable resources are:

www.experian.com/hitwise

www.pewinternet.org (US data)

www.nielsen.com

The Internet and primary research

Primary research involves gathering data for a specific research task. It is based on data that has not been gathered beforehand. Primary research can be either qualitative or quantitative.

Primary research can be used to explore a market and can help to develop the hypotheses or research questions that must be answered by further research.

Generally, qualitative data is gathered at this stage. For example, online research communities can be used to identify consumer needs that are not being met and to brainstorm possible solutions. Further quantitative research can investigate what proportion of consumers share these problems and which potential solutions best meet those needs.

Quantitative and qualitative data

> **Note**
>
> With larger sample sizes, qualitative data can be analysed quantitatively.

Data can be classified as **qualitative** or **quantitative**. Qualitative research is exploratory and seeks to find out what potential consumers think and feel about a given subject. Qualitative research aids in identifying potential hypotheses, whereas quantitative research puts hard numbers behind these hypotheses. Quantitative research relies on numerical data to demonstrate statistically significant outcomes.

The Internet can be used to gather both qualitative and quantitative data. In fact, the communities on the web can be viewed as large focus groups, regularly and willingly sharing their opinions about products, markets and companies.

In robust research studies, both qualitative and quantitative research can be applied at different stages of the study.

The main differences between quantitative and qualitative research are represented in Table 2 below.

Table 4.4.1

	Quantitative	Qualitative
Data gathered	Numbers, figures, statistics objective data	Opinions, feelings, motivations, subjective data
Question answered	What?	Why?
Group size	Large	Small
Data sources	Surveys, web analytics data	Focus groups, social media
Purpose	Tests known issues or hypotheses. Seeks consensus, the norm Generalises data	Generates ideas and concepts – leads to issues or hypotheses to be tested. Seeks complexity Puts data in context
Advantages	Statistically reliable results to determine if one option is better than the alternatives.	Looks at the context of issues and aims to understand perspectives.

Challenges	Issues can be measured only if they are known prior to starting. Sample size must be sufficient for predicting the population	Shouldn't be used to evaluate pre-existing ideas. Results are not predictors of the population.

Both quantitative and qualitative research can be conducted online.

Web analytics packages are a prime source of data. Using data such as search terms, referral URLs and internal search data can lead to qualitative information about the consumers visiting a website. However, when data is measurable and specific, such as impressions and clickthrough rates, it leads to quantitative research.

> **Note**
>
> Read more about this in the Data analytics chapter.

Sampling

Qualitative research is usually conducted with a small number of respondents in order to explore and generate ideas and concepts. Quantitative research is conducted with far larger numbers, enough to be able to predict how the total population would respond.

You should ensure the sample is representative of the population you are targeting as a whole. If your business transacts both online and offline, be aware that using only online channels for market research might not represent your true target market. However, if your business transacts only online, offline channels for your market research are less necessary.

Because quantitative research aims to produce predictors for the total population, sample size is very important. The sample size needs to be sufficient in order to make statistically accurate observations about the population.

For example, if you have 4 000 registered users of your website, you don't need to survey all of them in order to understand how the entire population behaves. You need to survey only 351 users to get a sample size that gives you a 95% confidence level with a ±5% confidence interval. This means that you can be 95% sure your results are accurate within ±5%.

There are several sample size calculators mentioned in section 4.7 on Tools of the trade.

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4.5: Online research methodologies

There are many online market research methodologies. This chapter touches on three of the most popular and useful ones: surveys, online focus groups and social media monitoring.

Which methodology should you choose?

That all depends on a variety of factors, from your research question and purpose to your budget and time. Here are some general pointers:

- **Surveys:** Ideal for collecting large amounts of quantitative data, and some qualitative data. They are quick and easy to set up, and can run automatically.
- **Online focus groups:** Ideal for engaging consumers and collecting qualitative data such as opinions, ideas and feelings about the brand. They require a larger time investment and a willing group of participants.
- **Online monitoring:** Ideal for collecting qualitative data on brand sentiment, and can also provide some quantitative data around volume of interest in the brand. This data can be collected passively, and there are several tools that can automate this.

Surveys

Surveys are questionnaires that contain a series of questions around a specific topic. Their purpose is to gather large volumes of quantitative data easily, though they can also collect some qualitative data.

Conducting surveys online allows for data to be captured immediately, and data analysis can be performed easily and quickly. By using email or the Internet for conducting surveys, geographical limitations for collecting data can be overcome cost effectively.

Technology allows you to compile sophisticated and user-friendly surveys. For example, as opposed to indicating impressions on a sliding scale, respondents can indicate emotional response. Or the survey can be tailored depending on previous answers, such as questions being skipped if they are not relevant to the respondent.

You can run ongoing online surveys at minimal cost. Simple polls can be used in forums and on blogs to generate regular feedback. Website satisfaction surveys are also an easy way to determine the effectiveness of a website or marketing campaign.

One application of surveys is allows for instant feedback on questions or ideas from an existing community, such as a trusted group of thought leaders, your brand's social media fans, or a pre-created research community. Examples include Facebook polling apps and real-time mobile survey platforms.

Designing surveys

How you design a survey and its questions will directly impact on your success. A survey can include any number and type of questions, and more complicated questions should appear only once users are comfortable with the survey. Be careful that you do not introduce bias when creating questions by asking leading questions.

Example 4.5.1

Incorrect: We have recently introduced new features on the website to become a first class web destination. What are your thoughts on the new site?

Solution

Replace with: What are your thoughts on the changes to the website? In general, you will also find that you get more accurate answers when phrasing questions in the past tense than in the continuous tense.

Example 4.5.2

Incorrect: How many times a week do you buy take-away food?

Solution

Replace with: In the past month, how many times did you buy take-away food? Questions in the survey should be brief, easy to understand, unambiguous and easy to answer.

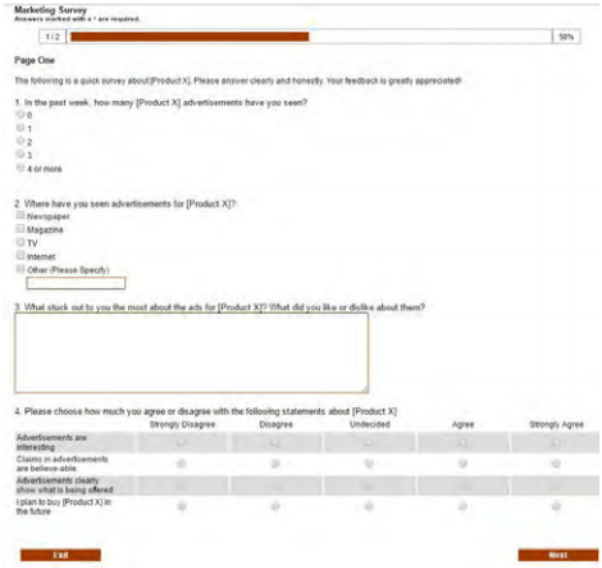


Figure 4.5.1: An example of an online survey with different question types. *Adapted From Screenshot*

Types of survey questions

1. Open-ended

Open-ended questions allow respondents to answer in their own words. This usually results in qualitative data.

Example 4.5.3

What features would you like to see on the website for the digital marketing textbook (https://www.redandyellow.co.za/cours...tbook-digital/)?

2. Closed

Closed questions give respondents specific responses from which to choose. These are typically multiple-choice questions with either one or multiple possible answers. This results in quantitative data.

Example 4.5.4

Do you use the digital marketing textbook website?

a. Yes
b. No

or:

What features of the digital marketing textbook website do you use? Tick all that apply.

a. Blog
b. Case studies
c. Free downloads
d. Additional resources

3. Ranked or ordinal

These questions ask respondents to rank items in order of preference or relevance. Respondents are given a numeric scale to indicate order. This results in quantitative data.

Example 4.5.5

Rate the features of the digital marketing textbook website, where 1 is the most useful and 4 is the least useful.

- Blog
- Case studies
- Free downloads
- Additional resources

4. Matrix and rating

These types of questions can be used to quantify qualitative data. Respondents are asked to rank behaviour or attitude.

Example 4.5.6

Rate the features of the digital marketing textbook website according to the following scale:

1 = love it, 2 = like it, 3 = no opinion, 4 = dislike it.

- Blog
- Case studies
- Free downloads
- Additional resources

Focus groups

Online focus groups involve respondents gathering online and reacting to a particular topic. Respondents can be sourced from all over the world and react in real time, arguably being freer with their responses since they can be anonymous in an electronic environment.

Online focus groups are ideal for having frank, detailed conversations with people who have an interest in your brand. This means they result in primary, qualitative data. This information can then be used to create quantitative research questions.

Online focus groups can be conducted using a range of technologies. The simplest is to use a text-based messaging program or online forum and there are many options available. More sophisticated tools allow for voice or video conferencing, and can make it easier for the researcher to pick up clues from the respondent's voice and facial expressions. Some tools allow the researcher to share their desktop screen with respondents in order to illustrate a concept or question.

Good options for conducting online focus groups include:

Google Hangouts: www.google.com/+/learnmore/hangouts

Skype: www.skype.com/en

GoToMeeting: www.gotomeeting.com/fec



Figure 4.5.2: An example of a Google Hangout in progress. *Adapted From Cnet, 2017.*

Focus groups are less formal than surveys meaning the researcher will have specific questions to ask, but the conversation usually grows and develops organically as participants discuss their impressions. Usually running for between one and two hours, focus groups are used to get consumer views on:

- New products or marketing campaigns
- Existing products and campaigns, and how they can be improved
- Sentiment around the brand
- Views on a brand's new direction or visual style
- Ideas for how the brand could improve its position or branding.

Online focus groups are excellent for collecting a lot of qualitative data quickly. When setting up the group, try to include enough participants to keep the conversation alive, but not too many so that some get drowned out by others, eight to ten is a good range. Also consider that you may run into technical troubles if people are connecting from different locations and Internet connections so be prepared to do some basic troubleshooting if this happens.

There are a number of different ways that you can recruit participants for an online focus group. This could include inviting people from your existing customer database, going through a traditional market research recruiting agent, or putting a call out on your website or social media communities. It is common practice to offer a small incentive to people who participate in a focus group, as it is a fairly time-intensive activity.

Sentiment analysis

Finding out if people are talking about you is quite difficult in the offline world, but almost effortless online. Rather than having to conduct real-world surveys and interviews, in the digital world you can simply 'listen' to the conversation happening about you.

Keywords – the foundation to categorising and indexing the web – make it simple to track conversations taking place online. Customers don't always use channels designated by a company to talk about that organisation, but the good news is that the Internet makes it easy for a company to identify and use the channels that customers have selected.

Online tools allow a company to track mentions of itself, its staff, its products, its industry and its competitors or anything else that is relevant. This is called online monitoring, online listening, or data sentiment analysis. It involves using digital tools to find

and tap in to existing conversations. The tool then gathers and collates all the mentions it finds, so that you can analyse the data for insights.



Figure 4.5.3: A sentiment analysis report *Adapted From Manufacturing control tower, 2017.*

Typically, searches include the following main focus areas:

- Company
- Brand name
- Key products
- Key personnel (names, job titles, etc.)
- Key campaigns and activities
- Industry
- Conferences
- Patents
- News
- Competitors
- Brand names
- Product launches
- Website updates
- Job vacancies
- Key people.

There are four different types of searches you can perform to track relevant brand keywords. Each modifies the specific type of data collected and aims to improve the quality and depth of the data you gather.

The four operators are:

1. **Broad match** – for example, Apple Computers. This is when any of or all words must be found in the mention.
2. **Direct match** – for example, “Apple Computers”. This is denoted by quotation marks and dictates that the tool should find mentions only where the phrase appears complete and in order in the content.
3. **Inclusive match** – for example, Apple +computers. This is denoted by a plus sign directly before a word or phrase. This will direct the tool to search for any mention that contains both Apple AND computers, although not necessarily in that order.
4. **Exclusive match** – for example, Apple –fruit. This is denoted by a minus sign directly before a word or phrase. This will instruct the tool to include only mentions that contain the first word or phrase but not when the second word is also in the same mention.

Combinations of these four types of searches (operators) can be used to improve accuracy.

Example 4.5.7

"Apple Computers" +"steve jobs" –fruit.

Applying this theory to the groupings above, some keywords used for Apple might be:

Company

- "Apple computers"
- "www.apple.com"
- Apple +Macbook, "iPod Nano", "Macbook Air", "iTunes" +music –radio
- "Steve Jobs"

Industry

- "Consumer Electronics Show" +"Las Vegas"
- "CEBIT"

Competitors

- Microsoft
- www.microsoft.com

It is also important to track common misspellings and typos, all related companies and all related websites.

Tracking the names of people key to a company can highlight potential brand attacks, or can demonstrate new areas of outreach for a company.

Brand names, employee names, product names and even competitor names are not unique. To save yourself from monitoring too much, identify keywords that will indicate that a post has nothing to do with your company, and exclude those in your searches.

For example, "apple" could refer to a consumer electronics company, or it could appear in a post about the health benefits of fruit. Finding keywords that will indicate context can help to save time. So, you could exclusive-match words such as "fruit", "tasty" and "granny smith".

Tools for data sentiment analysis

Thankfully, online listening does not entail hourly searches on your favourite search engine to see what conversations are taking place online. There are many different tools that monitor the web, and supply the results via email alerts or a web dashboard.

Note

The ideal gas law is easy to remember and apply in solving problems, as long as you get the **proper values a**

Google has several bespoke search services, and periodically adds more to the list.

- **Google Alerts**: www.google.com/alerts. Google Alerts will send an email when the keyword is used in either a credible news item or a blog post.
- **Google News**: news.google.com. Google News searches all news items for mentions of a keyword.
- **Google Patent Search**: https://www.google.com/advanced_patent_search. Google Patent Search allows you to keep track of all filings related to an industry, and searches can be done to see if there are patent filings which might infringe on other patents.
- **Google Video Search**: https://www.google.com/videohp?hl=En. Video Search relies on the data that have been added to describe a video, and will return results based on keyword matches.

In addition to these mostly free tools, there are also a number of premium paid tools available to make the process easier and more robust. See section 4.7 on Tools of the trade for more suggestions.

Other avenues for online research

Personal interviews

There are various tools available to the online researcher for conducting personal interviews, such as private chat rooms or video calling. The Internet can connect a researcher with many people around the world and make it possible to conduct interviews with more anonymity, should respondents require it.

Observation/Online ethnography

Taking its cue from offline ethnography, online ethnography requires researchers to immerse themselves in a particular environment. In this way insights can be gathered that might not have been attainable from a direct interview. However, they do depend more heavily on the ethnographer's interpretation, and are therefore subjective.

Online research communities

Although online communities are a valuable resource for secondary research, communities can also provide primary data. BeautyTalk is an example of an online research community that helps gather research data. The community platform can be used as a means to elicit feedback about products and can generate ideas for new products. This is qualitative data that can aid the company in exploring their research problem further. In many cases, social media can be used to gather insight about a brand or customer experience. It is important to remember, however, that a representative sample is necessary for making solid conclusions.



Figure 4.5.4: The BeautyTalk online community *Adpated From Ecoconsultancy, 2017.*

Listening labs

When developing websites and online applications, usability testing is a vital process that will ensure the website or application is able to meet consumers' needs. Listening labs involve setting up a testing environment where a consumer is observed using a website or application.

Conversion optimisation

Conversion optimisation aims to determine the factors of an advert, website or web page that can be improved in order to convert customers more effectively. From search adverts to email subject lines and shopping cart design, tests can be set up to determine what variables are affecting the conversion rate.

The Conversion optimisation chapter covers tools for running tests, such as A/B split testing and multivariate testing.

How to get responses: Incentives and assurances

As the researcher, you know what's in it for you when sending out a survey. You will receive valuable insights that will aid in making business decisions. But what is in it for the respondents?

Response rates can be improved by offering respondents incentives for participating in the research, such as a chance to win a grand prize, a discount or special offer for every respondent, or even the knowledge that they are improving a product or service that they care about.

Some researchers feel that monetary incentives are not always a good thing. Some respondents may feel that they need to give 'good' or 'correct' answers that may bias results. Alternatively, you may attract respondents who are in it just for the reward. One approach could be to run the survey with no incentive, with the option of offering one if responses are limited.

Designing the survey to assure respondents that a minimal time commitment is required and their privacy is assured can also help to increase responses.

Room for error

With all research there is a given amount of error to deal with. Bias may arise during surveys and focus groups, for example, interviewers leading the respondents. Or bias may be present in the design and wording of the questions themselves. There could be sample errors or respondent errors. Using the Internet to administer surveys removes the bias that may arise from an interviewer. However, with no interviewer to explain questions, there is potential for greater respondent error. This is why survey design is so important, and why it is crucial to test and run pilots of surveys before going live.

Respondent errors also arise when respondents become too familiar with the survey process. The general industry standard is to limit respondents to being interviewed once every six months.

Sample error is a fact of market research. Some people are just not interested, nor will they ever be interested, in taking part in research. Are these people fundamentally different from those who do? Is there a way of finding out? To some extent, web analytics, which track the behaviour of all visitors to your website, can be useful in determining this.

When conducting online research, it is crucial to understand who is in the target market, and what the best way to reach that target market is. Web surveys can exclude groups of people due to access or ability. It is vital to determine if is this is acceptable to the survey, and to use other means of capturing data if not.

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4.6: Justifying the cost of research

Regular research is an important part of any business' growth strategy, but it can be tough to justify the budget necessary for research without knowing the benefit. Conducting research can cost little more than an employee's work hours, depending on his or her skills, or it can be an expensive exercise involving external experts. Deciding where your business needs are on the investment scale depends on the depth of the research required, and what the expected growth will be for the business. When embarking on a research initiative, the cost to benefit ratio should be determined.

Testing should be an ongoing feature of any digital marketing activity. Tracking is a characteristic of most digital marketing, which allows for constant testing of the most basic hypothesis: Is this campaign successful in reaching the goals of the business?

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4.8: Tools of the trade

Creating and managing online surveys:

- SurveyMonkey: www.surveymonkey.com
- Google Forms: accessed through Google Drive drive.google.com
- Split test calculator: www.usereffect.com/split-test-calculator
- Sample size calculator: www.rogerwimmer.com/mmr/samplesizecalculator.htm
- Internet Usage World Stats: www.internetworldstats.com
- Google Think: www.google.com/think
- Silverback usability testing software: www.silverbackapp.com
- Mobile-based survey tools: www.ponderingpanda.com (focused on the African continent), Survey Swipe www.surveyswipe.com/mobile-surveys.html
- Ideo Method Cards app (ideas for qualitative research): www.ideo.com/work/ideo-method-card-app
- Premium online monitoring tools: BrandsEye: http://www.brandseye.com/, SalesForce Marketing Cloud: http://www.salesforcemarketingcloud.com/

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4.9: Adantages and challenges

Market researchers are increasingly turning to online tools in their research processes. The Internet allows for research at a far lower cost; it can also more easily cross geographic boundaries and can speed up the research process.

This is not to say there are not downsides. While the Internet makes it possible to reach a far larger group of people without the cost of facilitators, this does come with some challenges. For example, you cannot control the environments in which information is being gathered. For an online sample, it's important to focus on getting the correct number of people to make your study statistically viable. If your questions are not carefully drafted, confusing questions could lead to answers that are flawed or not relevant. Additionally, online incentives could lead to answers that are not truthful, meaning that the value of the data could be questionable. Certain target groups are not accessible via the Internet, and so it's important that you carefully consider who you are trying to reach.

The value of Internet research should by no means be discounted, but it is important to consider the nature of the study carefully, and interrogate the validity and legitimacy of the data as a valid representation. Data is meaningful only if it is representative, so be sure to establish goals and realistic expectations for your research.

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4.10: Case study - Sentiment data mining predicts political outcomes

One-line summary

BrandsEye, is an opinion mining company based in South Africa, who accurately predicted two significant political outcomes in 2016, outperforming traditional polling methods and showcasing the value of analysing social media analysis at scale.

The problem

The controversial referendum resulting in Britain leaving the European Union, and the election victory for Republican nominee Donald Trump in the US presidential race in 2016, arguably came as surprises to the global community. This is largely due to the fact that the traditional polling methods used to predict the results of these separate national votes indicated that neither of these things would happen.

The Pew Research Centre listed a number of reasons for traditional polling methods falling short:

- **Non-response bias:** The sample population who took part in these polls were not representative of those who actually turned out to vote.
- **Shy Trumper:** Choosing to vote for Trump was not seen as socially desirable, and so many would not admit to this in the poll.
- **Failed voter turnout:** Many people who planned to vote, and stated their intentions in polls, did not in fact do so (Press 2016).

The solution

BrandsEye's methodology, in both cases, accurately predicted the outcomes of these votes because it relied on real time organic conversations happening on multiple online platforms, and used machine learning and a crowd sourcing approach to analyse the sentiment of the general conversation. Those who may have been reticent to take part in a poll, or to declare their political affiliations in official channels, did feel comfortable doing so on their own social media channels.

As explained on the BrandsEye website,

"...the traditional approach to social media analysis has been algorithmically driven, even though it is well known that machines fail to understand sarcasm and nuance, particularly in the social media context. With our unique crowd-sourcing approach to sentiment analysis, BrandsEye used people to understand the referendum commentary. Every online comment was independently analysed by several trained contributors to create a 95% confidence level with a 2.5% margin of error, an unheard of amount of precision in social media analysis. (N.A. 2016)"

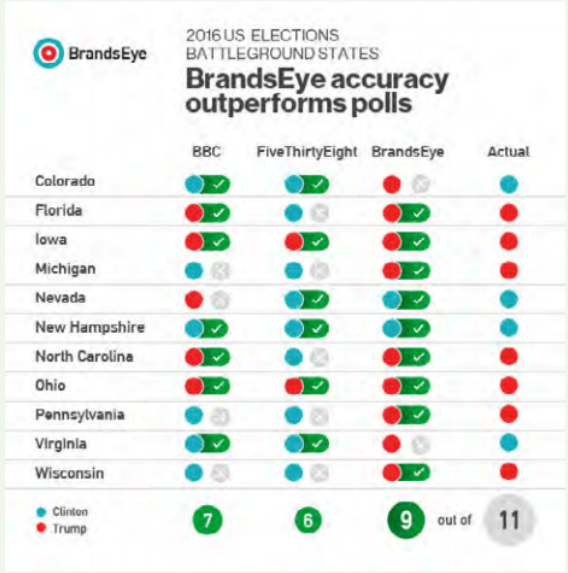


Figure 4.10.1: BrandsEye accuracy outperforms polls in the 2016 US presidential election *Adapted From Brandseye, 2016*

The results

The results speak for themselves. In contrast to traditional polling, BrandsEye's weighted average approach, matched the outcome of 9 of the 11 key swing states. As with Brexit, accurate social media analysis had once again proven to be the best way to understand the voice of the people. That voice is a human voice and BrandsEye's use of trained humans to efficiently and effectively understand the sentiment of millions of citizens was the key to unlocking how they truly felt.

As the world becomes more connected, differences between decision makers and their stakeholders are becoming more visible and volatile than ever. Traditional methods of understanding a broad group of people are breaking down because they can neither measure the intensity nor the commitment of the emotions. Sophisticated analysis of social media, however, offers a more reliable understanding of what is happening in today's world by combining world class tech and human understanding to provide a window into how people really feel and the factors driving that emotion.

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4.11: The bigger picture

Understanding your market is the foundation of every marketing activity, online or off. If you don't know who you're speaking to, or what your audience cares about, it's unlikely that your message will resonate with them.

Market research will define the content you create across channels like email marketing, digital copywriting, SEO and online advertising. It helps you find your audiences on social channels by indicating where they spend most of their time, and how they like interacting with your brand. It also helps you meet their needs by defining the touchpoints they expect from your brand, especially when it comes to creating web and mobile channels.

The more data you can gather about your audience, the better you will be able to optimise and improve your marketing efforts. Market research is an excellent supplement to the quantitative data you can gather through data analytics.

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4.E: Market Research(Exercises)

Case study questions

1. What is sentiment data?
2. How could a tool like BrandsEye be used to gather information about your customers? Suggest some ideas.
3. Why was BrandsEye able to correctly predict the results of the national referendum on Brexit and the US Presidential Elections?

Chapter questions

1. Discuss the relationship between the ideas discussed in the Data chapter and this one.
2. What is primary research?
3. What role does online research play in the overall market research toolkit?

Further reading

http://s3.amazonaws.com/SurveyMonkey...martSurvey.pdf – The Smart Survey Design is a useful white paper that will help you master drawing up relevant web surveys.

Learn about probability sampling: https://www.socialresearchmethods.net/kb/sampprob.php

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4.S: Market Research(Summary)

Market research means gathering and analysing data in order to gain insight to consumers, understand a market and make business decisions. Information can be gathered about customers, competitors and the market.

Research can be conducted based on secondary data, which refers to information or data that is already published, or based on primary data, which is data gathered specifically for a particular research problem.

Research can also be qualitative or quantitative. The Internet provides the tools for gathering qualitative data, while online tools such as surveys and web analytics packages are ideal for gathering quantitative data.

Surveys, online focus groups and online monitoring are three excellent ways to conduct research online.

Analytics and online report tools play a big role in providing data. While these are digital marketing tactics in themselves and are covered later in this book, keep in mind that they also provide information that can feed into research conducted for a particular purpose.

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5: CREATE - USER EXPERIENCE DESIGN

Learning Objectives

In this chapter, you will learn:

- To think about web projects with a UX mindset.
- To recognise and create usable and enjoyable experiences for desktop and mobile users.
- The nuts and bolts of implementing UX strategy step by step.
- About a variety of awesome UX tools.

5.1: Introduction

5.2: Key terms and concepts

5.3: Understanding UX design

5.4: Core principles of UX design

5.5: Implementing UX design

5.6: Advantages and disadvantages of UX design

5.7: References

5.8: Conduct Testing

5.9: Tools of the trade

5.10: Case study - AO Becomes customer centred

5.11: The bigger picture

5.E: User Experience Design(Exercises)

5.S: User Experience Design(Summary)

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5.1: Introduction

Have you ever visited a website that was confusing, with broken links and long, rambling text? Or, conversely, have you had a web experience that just worked, where everything was clear, easy and enjoyable to use? If so, you've encountered the extremes of user experience design. Excellent UX can delight and convert customers. Bad UX can lead to lost revenue and less chance of repeat visitors.

In practice, great UX can differ based on the audience and context. The principle remains the same, make it easy for your users to find what they need and to convert to your desired goal. UX is the first, foundational step of an effective digital asset.

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5.2: Key terms and concepts

Table 5.2.1

Term	Definition
Above the fold	The content that appears on a screen without a user having to scroll.
Accessibility	The degree to which a website is available to users with physical challenges or technical limitations.
Breadcrumbs	Links, usually on the top of the page, that indicate where a page is in the hierarchy of the website.
Call to action (CTA)	A phrase written to motivate the reader to take action such as sign up for our newsletter or book car hire today.
Content audit	An examination and evaluation of existing content on a website.
Content strategy	In this context, a plan that outlines what content is needed for a web project and when and how it will be created.
Convention	A common rule or tried-and-tested way in which something is done.
Conversion	Completing an action or actions that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Credibility	In this context, how trustworthy, safe and legitimate a website looks
Fidelity	An interface design. A low-fidelity prototype will be basic, incomplete and used to test broad concepts. A high fidelity prototype will be quite close to the final product, with detail and functionality and can be used to test functionality and usability.
Information architecture	The way data and content are organised, structured and labelled to support usability.
Navigation	How a web user interacts with the user interface to navigate through a website, the elements that assist in maximising usability and visual signposting so users never feel lost.
Prototype	Interactive wireframes, usually of a higher fidelity, that have been linked together like a website, so that they can be navigated through by clicking and scrolling.
Responsive design	A design approach that enables a website display to change depending on the size of the viewport or screen, regardless of the device on which it is displayed.
Search engine optimisation (SEO)	The process of improving website rankings on search engine results pages.
Sitemap	On a website, a page that links to every other page in the website, and displays these links organised according to the information hierarchy. In UX terminology, this is the visualised structural plan for how the website's pages will be laid out and organised.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
User-centred design (UCD)	The design philosophy where designers identify how a product is likely to be used, taking user behaviour into consideration and prioritising user wants and needs. UCD places the user at the centre of the entire experience.
User experience design (UXD)	The process of applying proven principles, techniques and features to create and optimise how a system behaves, mapping out all the touchpoints a user experiences to create consistency in the interaction with the brand.
User interface (UI)	The user-facing part of the tool or platform i.e. the actual website, application, hardware or tool with which the user interacts.

Wireframe	The skeletal outline of the layout of a web page. This can be rough and general, or very detailed.

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5.3: Understanding UX design

User experience (UX) can be defined as all the experiences for example, physical, sensory, emotional and mental, that a person has when interacting with a digital tool. The field of UX is full of similar sounding jargon, so here's a quick guide to the terms you should know.

User experience (UX|) is the overall satisfaction a user gets from interacting with a product or digital tool.

User experience design (UXD, sometimes UED) is the process of applying proven principles, techniques and features to a digital tool to create and optimise the user experience.

User-centred design (UCD) is the design philosophy that prioritises the user's needs and wants above all else, and places the user at the centre of the entire experience. This often entails research and testing with real users of the site or product.

User interface (UI) is the user-facing part of the tool or platform and is the part of the actual website, application or tool that the user interacts with.

Usability refers to how user friendly and efficient a digital product is.

Online UX can be divided into two broad categories.

- **Functional UX.** This covers the elements of the user experience that relate to actually using the tool such as working technical elements, navigation, search and links.
- **Creative UX.** This is the bigger, harder to define impression created by the tool. The so-called 'wow' factor that covers visual and creative elements.

Note

User experience design roles differ in the skills needed and the functions performed.

There are six qualities that make up good UX:

- **Findability** – Can I find it easily? Does it appear high up in the search results? How long does it take me to find something on the site? Does the three click rule work on this site?
- **Accessibility** – Can I use it when I need it? Does it work on my mobile phone, or on a slow Internet connection? Can I use it as a disabled person?
- **Desirability** – Do I want to use it? Is it a pleasant experience, or do I dread logging in? • Usability – Is it easy to use? Are the tools I need intuitive and easy to find?
- **Credibility** – Do I trust it? Is this website legitimate?
- **Usefulness** – Does it add value to me? Will I get something out of the time I spend interacting with it?

The benefits of UX

Note

The three click rule suggests that a user should be able to access what they need from your site with no more than three mouse clicks.

There are some real, tangible benefits to applying UX design to digital marketing strategies.

Good UX is an excellent way to differentiate your brand in the market and give yourself a competitive advantage. If your online touchpoints are easy, intuitive and awesome to use, your customers won't have any reason to look elsewhere.

Good UX research and design allows you to find the best solution for your needs.

Every business, website and online service is unique in some way, which means that the way it is constructed must be unique too.

Example 5.3.1

Amazon's US $300 million button is perhaps the most dramatic example of how a simple UX fix can impact the business. Amazon managed to gain an extra US $300 million worth of sales simply by changing their 'Register' button to one that read 'Continue' instead. The number of customers increased by 45% because they no longer felt they needed to go through an onerous registration process simply to fulfil a basic shopping action. In fact, nothing else about the purchase process had been changed! (Spool, 2009).

Every marketer knows that the ideal customer is a happy customer. Customers who love the experience you give them will become loyal clients, and possibly even brand evangelists.

Applying UX principles allows you to get your digital tools working earlier, with much better functionality, at a lower cost. You can cut out features and elements that you simply don't need, and focus on the core user experience. This optimised development process in turn leads to sites that are easier and cheaper to maintain, upgrade and support across multiple platforms.

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5.4: Core principles of UX design

User-centric design

While this may seem like the most obvious point, it's surprising how often the user is forgotten in the user experience. Business owners, marketers and web developers frequently focus on creating the web platforms they want and think are best, instead of really interrogating what the user needs. Often, the performance of web assets is compromised when the design process is driven only by internal business needs, for instance, ensuring that each department in the company has a space that it controls on the home page at the expense of what the user needs. When designing for the user, you need to ask the following questions:

- Who is the user?
- What are the user's wants and needs from your platform?
- Why is the user really coming to your website?

> **Note**
>
> The customer journey is introduced in the chapter on Strategy and context. It refers to the steps your customer takes when engaging with your brand.

- Where is the user most likely to be in their customer journey when they visit your site?
- What are the user's capabilities, web skills and available technology?
- How can the site facilitate the customer journey to conversion and purchase?
- What features would make the user's experience easier and better?

The answers to these questions will come out of user research, as discussed in the Market research chapter earlier in this book.

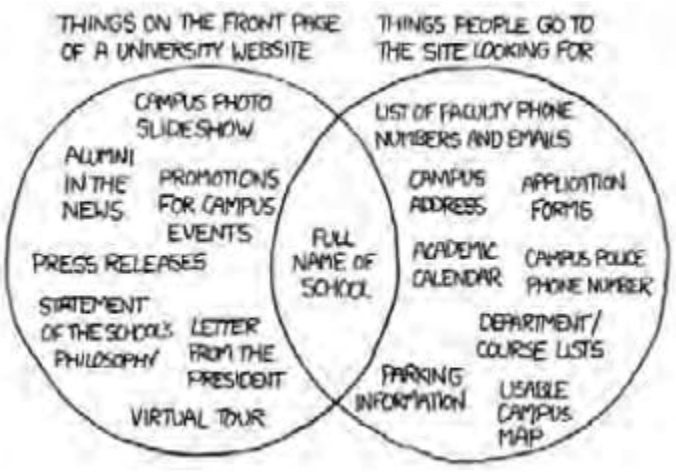


Figure 5.4.1: It's essential to give users exactly what they need *Adapted From XKCD, 2015.*

Of course, many users may not know exactly what their wants and needs are. It is the UX practitioner's job to discover these through research and interpret them in the best way possible. Keep Henry Ford's famous quote in mind here: "If I had asked people what they wanted, they would have said faster horses."

(www.goodreads.com)

Mobile users When discussing user-centric design, whatever you have gleaned about the user context must be considered. Today more than half of web traffic originates from a mobile device, with users accessing the Internet through either a smartphone or tablet (think with Google, 2016). This number is increasing every year and is expected to be over 70% by 2019 (Internet Society, 2015). Therefore, designing for mobile must be a priority. The context of mobile users affects the way in which they use their

devices. Mobile users are:

- **Goal orientated.** Mobile users turn to their mobile devices to answer a question, quickly check email, find information or get directions. They often have a distinct purpose in mind when using their phone.
- **Time conscious.** There are two aspects to this. On the one hand, mobile users are often looking for urgent or time-sensitive information such as the address of the restaurant they are looking for, so answers should be available as quickly as possible. On the other hand, the mobile device is also frequently used to kill time or as a source of entertainment such as reading articles on the couch, or playing games while waiting in a queue, so content is also crucial. User research will tell you which of these groups your users fall into and how you need to structure your site accordingly.

Note

Some mobile users use their phones for browsing in a similar way one would use a desktop computer. How does your audience use their devices?

- **Search dominant.** Even users who know what they are looking for tend to navigate there via search, for example, typing the brand name into Google, rather than accessing the page from a bookmark or typing the URL directly into the browser bar.
- **Locally focused.** According to Google search data 30% of all mobile searches are for location (think with Google, 2016). Since mobile phones are always carried, users turn to them to find information on things in their surroundings from local businesses to more detail on a product they have just seen.

Usability is especially challenging with mobile. One of the biggest challenges is the sheer number of different device categories and models available. The OpenSignal report from 2014 identified 18 796 distinct android mobile devices, running a myriad of operating systems (The Next Web, 2014).

The limitations of mobile create additional considerations for the UX designer to address to ensure that visitors have a pleasant user experience while visiting the site. These limitations include:

- **Small screens.** Even the largest smartphones are screens many times smaller than a standard laptop and tablets fall somewhere between the two. This means that the user has a much smaller window through which to perceive and understand the website, so it may be difficult to get an overall impression of where things are or what's important.
- **Difficult inputs.** Mobile phones don't come with full-sized keyboards and mice, so they are usually a lot more difficult to operate fluidly and accurately than desktop computers. Touchscreens may be the exception here, although they also have their own pitfalls.
- **Slow connection speeds.** Many mobile phone users, especially in developing countries, are on slow Internet connections. Even fast options such as 3G can often be more sluggish than a desktop equivalent. This makes loading large websites or images slow and frustrating and can be expensive in terms of data costs.

Note

One design approach places 'content first'. This means that you should decide which content to provide on your site depending on whether users are viewing it from a mobile or a desktop computer, and then adapt the layout and material to that device.

- **Slow hardware.** Sometimes the slowness comes from the hardware itself. The more basic the phone, the slower its processing components are likely to be making the simple act of opening the browser and loading a page time consuming.

There are three main approaches to creating mobile-accessible content.

1. Mobile websites (called mobi sites)
2. Native and web applications (called apps)
3. Responsive websites (websites that adapt to the device).

Usability and conventions

> **Note**
>
> Read more about this in the Web development and design chapter.

Usability is about making the digital assets we build easy and intuitive to use. To paraphrase Steve Krug, don't make your users think: they should just do (Krug, 1997–2013).

One of the most important aspects of usability involves sticking to conventions, which are simply common rules or ways of displaying or structuring things on the web. Popular conventions include:

- Links that are blue and underlined
- Navigation menus at the top or left of the web page
- The logo in the top left hand corner which is linked to take the user back to the home page
- Search boxes placed at the top of the page, using standard wording such as 'search', or a magnifying glass icon.

> **Note**
>
> Can you think of any other web conventions? How have these evolved over time, and how important is it to stick to the rules?

Ensure that all website elements such as menus, logos, colours and layout are distinct, easy to find and kept consistent throughout the site. There are some key 'dont's' when it comes to building a user-friendly and usable website:

- Never resize windows or launch the site in a pop-up.
- Do not use entry or splash pages i.e. a page that site visitors encounter first before reaching the home page.
- Flash is no longer used to design websites. Unaided, most search engine spiders cannot effectively crawl Flash sites, and Flash usually doesn't work on many mobile devices.
- Don't distract users with 'Christmas trees' such as blinking images, flashing lights, automatic sound, scrolling text and unusual fonts.

And finally, while the following principles apply to desktop as well, they are especially valid for mobile:

- **Reduce loading time.** Try to keep content and actions on the same page as this ensures better performance as there are fewer page loads. Encourage exploration especially on touchscreens, users like to browse elements and explore. This makes them feel in control.
- **Give feedback.** Ensure that it is clear when the user performs an action. This can be achieved through animations and other visual cues.

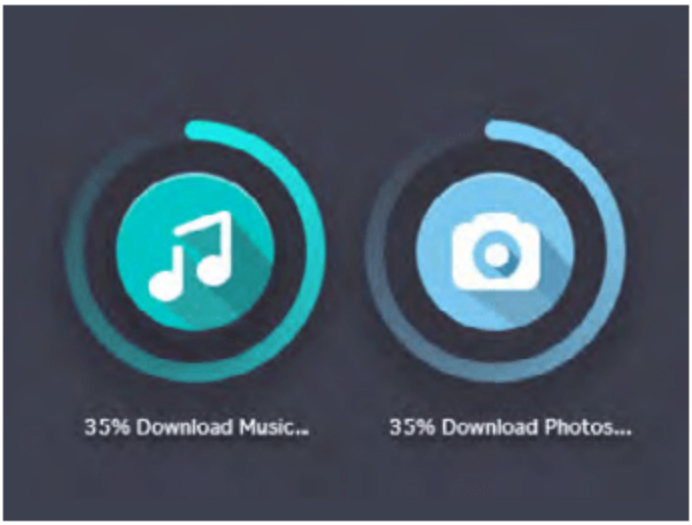


Figure 5.4.2: Animations providing feedback to the user of the action they have requested *Adapted From Dribble, 2013.*

Note

Some note the increasing presence of one page websites, especially for sites with limited content and large images, which enables the site to load quicker. Check out this article that provides guidance on what types of sites should opt for one page sites: www.webinsation. com/should-i-havea-one-page-website. This approach is less effective in countries where data costs are prohibitive.

- **Communicate consistently.** Ensure that you deliver the same message across all your touchpoints, for example, using the same icons on the website as you would on the mobile app prevents users from having to relearn how you communicate.
- **Predict what your user wants.** Include functionality such as autocomplete or predictive text. Remove as much manual input as possible to streamline user experience.

It's useful to consider usability guidelines to ensure that your website is on track. Stay In Tech provides a usability checklist online at https://stayintech.com/info/UX.

Note

Mobile users prefer to scroll in one direction.

Simplicity

In UX projects, the simpler option is almost always the more user-friendly one. Even if your service or product is complex your customer-facing web portals need not be. In fact, it's important to remember that most customers want the most basic information from you, such as "What is this?" and "How does it work?" Simplicity can mean several things:

- **Lots of empty space.** In design terms, this is referred to as negative or white space. Though, of course, it need not specifically be white. Dark text on a light background is easiest to read. In general, the more effectively 'breathing room' is placed between various page elements, lines of text, and zones of the page, the easier it is for the user to grasp where everything is.
- **Fewer options.** Studies have found that people faced with fewer choices generally choose more quickly and confidently, and are more satisfied with their decision afterwards (Roller, 2010).
- **Plain language.** Unless your website is aimed at a highly specialised technical field, there's usually no need to get fancy with the words you use. Clear, simple, well-structured language is the best option when creating a great user experience.

Note

Read more about this is in the Digital copywriting chapter

- **Sticking to conventions.** As we've said before, conventions are excellent shortcuts for keeping things simple for users. There's no need to reinvent the wheel and try to teach your users a whole new way of navigating a website.



Figure 5.4.3:The Fresh Books homepage is clean, simple, inviting and easy to use *Adapted From Screenshot, FreshBooks 2016*

When it comes to mobile, it's even more important to simplify. Show information only when it's needed. While you should ensure that the mobile asset provides all the same information as the desktop equivalent, this doesn't need to be presented in the same format or volume.

Credibility

Credibility refers to how trustworthy and legitimate something looks, and is a big consideration for web users when deciding to use your website or not. Here are some of the cues that visitors use to determine the credibility of a website:

- **Looks –** does it look professional and beautiful?
- **Prominent phone numbers and addresses are easy to locate** – this assures the visitor that there are real people behind the website, and that they are easily reachable.
- **Informative and personal 'About us'** – some customers want to see the inner workings of a company and are interested in the head honchos. Consider including employee pictures and profiles to add personality to the site.
- **Genuine testimonials** – testimonials are a great way to show potential customers what your current customers have to say about your organisation. Trust is vital, and this is one way to encourage it. Video testimonials can be particularly effective, assuming your audience does not face data restrictions.

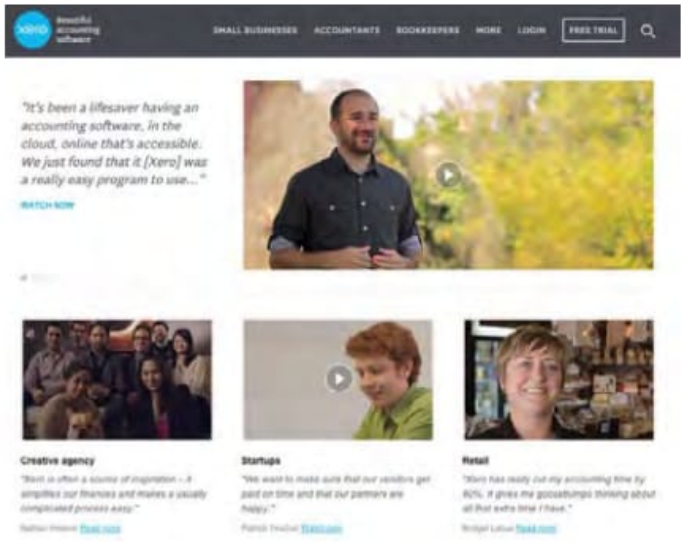


Figure 5.4.4: Genuine user testimonials can create a sense of credibility, like this example from Xero which includes text and video testimonials *Adapted From Screenshot, Xero, 2016.*

- **eCommerce** – using a reputable sales channel helps your websites credibility.
- **Social media** – having a social media presence often goes further towards establishing credibility than testimonials, which could have been faked.
- **Logos of associations and awards** – if you belong to any relevant industry associations or have won any awards feature them. Not only does this go a long way towards establishing your credibility, but it will show that you're at the top of your game, a notch above the competition.
- **Links to credible third-party references or endorsements** – this is a way to assert your credibility without tooting your own horn.
- **Fresh, up-to-date content** – a news section that was last updated a year ago implies that nothing has happened since or that no one cares enough to update it.
- **No errors** – spelling and grammar mistakes are unprofessional, and while the large majority of readers may not pick them up, the one or two who do will question your credibility. This extends to broken links, malfunctioning tools, and interactive elements that don't work as advertised.

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5.5: Implementing UX design

The UX design process happens before, during and after the website is being built. It ties in very closely with strategy and research, web development and design, SEO, content strategy and creation, and later conversion optimisation.

As discussed in section 5.4, Core principles of UX design, mobile should not be an afterthought, in UX or any other digital endeavour. It should be prioritised in strategy, design and implementation. The 'mobile first' movement supports this notion, and aims to create mobile user experiences first, and then adapt these for the web (instead of the other way around). Designing this way has many advantages, since the principles of good mobile UX works just as well on full sites using simple designs, linear interfaces and clear buttons and features.

Conduct research and discovery

Step one involves conducting detailed research on the business, the users, and the technology involved. This is covered fully in the Data driven decision making chapter, which includes user research. Doing this lets UX practitioners know exactly what they need to do to address the needs of the business and audience. This will generate a lot of data that needs to be filtered and organised.

Create the site's basic structure

Information architecture (IA) is about managing information, taking a lot of raw data and applying tools and techniques to it to make it manageable and usable. Categories and pages should flow from broad to narrow. An intuitively designed structure will guide the user to the site's goals.

IA operates on both the micro and the macro level covering everything from the way individual pages are laid out, for example where the navigation and headings are, to the way entire websites are put together.

Most websites have a hierarchical structure, which means there are broad, important pages at the top, and narrower, more specific and less important pages further down. Hierarchical structures can be very broad and shallow having many main sections with few lower pages or very narrow and deep with few main sections and many pages below. It's up to the UX practitioner to find the right balance of breadth and depth.

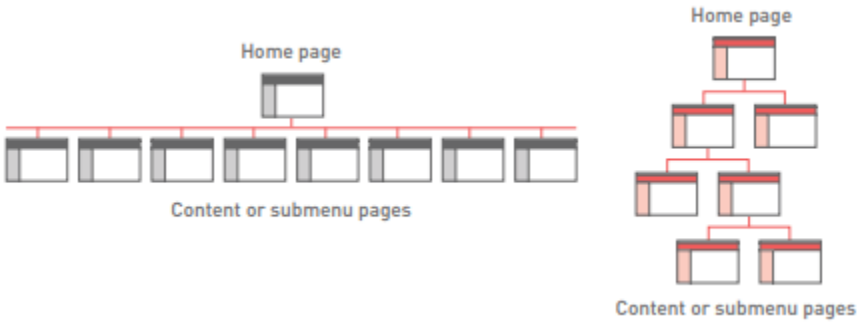


Figure 5.5.1: A broad, shallow hierarchy on the left, and a narrow, deep hierarchy on the right *Adapted From WebStyleGuide, 2011.*

Analyse content

If you're working on a website that already exists, it will be populated with a wide variety of content. In this case, you need to perform a content audit, which is an examination and evaluation of the existing material.

If the website is new or if you plan to add new content to an existing website you need to put together a content strategy. This is a plan that outlines what content is needed and when and how it will be created. There's no single template or model for this so every content strategy will be unique.

The content strategy is largely the responsibility of the strategy, copy and concept teams, but the UX practitioner needs to get involved in a few key roles. The points that UX needs to address are:

> Note
>
> Read more about this in the Content marketing strategy chapter.

- **What the site should achieve.** Naturally, the content should work towards achieving the site's and business' objectives.
- **What the user wants and needs.** By conducting thorough user research you should be able to answer this question. Provide only content that will add real value to the user.
- **What makes the content unique, valuable or different.** Content needs to provide value to the user. A content strategy will help ensure content is updated regularly and will include up to date information.
- **The tone and language used.** You need to consider the tone, whether it's fun, light or serious, the register, whether it's formal or informal and the style you will use across your content. Make sure tone, style and register are consistent across text, images, videos and other content types. Correct grammar and spelling are important considerations as they speak to the credibility of the site.

Principles of creating content

There are three key points you should consider here.

1. Structure

Content needs to be written so that users can find the information they need as quickly as possible. The chapter on Digital copywriting will cover this in more detail. Copy can be made more easily readable by:

> Note
>
> Don't forget SEO. There are lots of ways in which a website can be optimised during the UX planning process. Have a look at the SEO chapter for some guidelines on what to include.

- Highlighting or bolding key phrases and words
- Using bulleted lists
- Using paragraphs to break up information
- Using descriptive and distinct headings.

2. Hierarchy

On the page, use an inverted pyramid style or F structure for your copy. The important information should be at the top of the page, to make for easy visual scanning. The heading comes first and is the largest and boldest type on the page. The subheading or blurb follows this, and then the content is presented in a descending scale of importance. Sentences should be short and important words should appear early in the sentence, especially in bullet points. Eye-tracking research has shown that the F structure is the still the most user friendly structure, as this is the natural flow of the eye (Hanes, 2016).



Figure 5.5.2: Users read websites in an F structure, and your site should enable this *Adapted From AdpushupBlog, 2015*

3. Relevance

Above all, the content on the page must be relevant to the user and the purpose of the page itself. If a user clicks to read about a product but ends up on a page with content about the company, their experience is going to be tarnished.

Create a sitemap

In UX terminology, a sitemap is the visualised structural plan for how the website's pages will be laid out and organised.

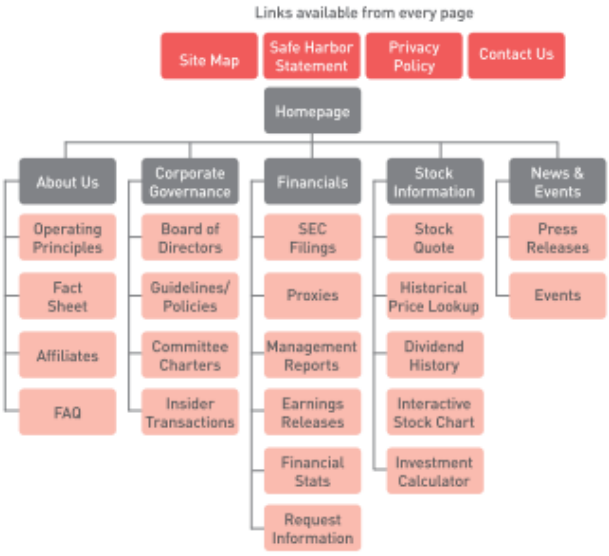


Figure 5.5.3: An example of a sitemap *Adapted From Stokes, 2013.*

To create the visuals for your sitemap, you can follow this process:

1. Start by **defining your home page**. This should be the top item in the hierarchy.
2. **Place the main navigation** items below this.
3. **Arrange your pages of content** below the main navigational items, according to the results of your user testing and insight, and your information architecture structure.

4. **Add pages** below this until you have placed all your content. Make sure that every page is accessible from at least one other page. It may seem obvious, but you'd be surprised how often this is overlooked!
5. **Define any other static navigation elements** i.e. the footer, sidebar, header navigation, search tools. Place these in your diagram in a logical place possibly branching off directly from the home page, or as separate blocks.

Which sitemap is which

The term 'sitemap' can have two meanings. One is the way it's defined above – the structural plan of the website. The other is a page on your website that lists all the pages available in a logical and accessible way. An example is the Apple website's sitemap: www.apple.com/sitemap. This sitemap should be available from every page. Dynamic sitemaps can be employed so that the sitemap is updated automatically as information is added to the website. Different sitemaps exist for different purposes, so investigate what your users would find most useful.

Build the navigation

The navigation should guide users easily through all the pages of a website; it is not just about menus. Successful navigation should help a user to answer four basic questions:

1.Where am I?

Navigation should let the users know where they are in the site. Breadcrumb links, clear page titles, URLs and menu changes all help to show the user where he or she is. The larger your site is and the more levels it has, the more important it becomes to give your users an indicator of where they are in relation to everything else on the site. This helps the users to understand the content of the page that they are on, and makes them feel more confident in navigating further through the site.

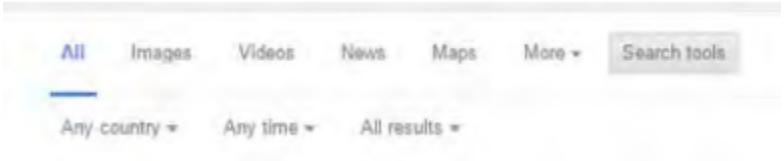


Figure 5.5.4: Google's search results have clear navigation options *Adapted From Google, 2016*

2. How did I get here?

Breadcrumb navigation often indicates the general path a user may have taken. In the case of site search, the keyword used should be indicated on the results page.

3. Where can I go next?

Navigation clues let a user know where to go to next such as 'add to cart' on an eCommerce site, or a contextual link that indicates 'read more'. The key is making the options clear to the user.

Note

There is a tendency, when thinking about navigation, to plan in only one direction, from the home page down the chain of pages in the hierarchy. But very often, users arrive at the site from a link or search result that drops them deep in the website. This makes it equally important to look at reverse navigation getting from the bottom level pages back to the top.

4. How do I get home?

It has become convention that the logo of the website takes the user back to the home page, but many users still look in the main

menu for the word ‘home’. Make sure that they can get back to the beginning quickly and easily.

Create the layout

A web page can be broken down roughly into four zones:

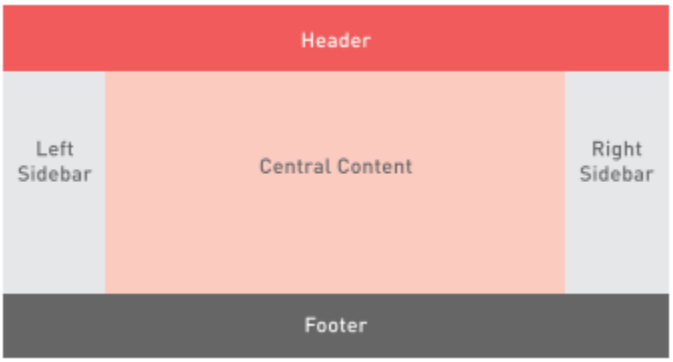


Figure 5.5.5: The four main zones of a website *Adapted From Stokes, 2013*

Each of these typically contains certain types of elements and content, such as:

1. **The header** (at the top of the page) – used to identify the site and provide basic tools: Logo or identifying mark (possibly including the brand’s tagline) Main navigation Login feature Search bar
2. **The central content area** – used to present the main content The actual content specific to the page such as text, images, videos and more (this can be broken into several columns) CTAs of various kinds such as “Sign up”; “Get started”; “Claim your free trial”

> Note
>
> Users consider information in side bars to be less important, so don’t put your key message here.

3. **The sidebar** (either on the left or the right, or sometimes on both sides) – used to present secondary content and tools Secondary navigation bar, or other navigation features (for example, blog article archive by date)

CTAs, including buttons and signup forms

Additional content, like links or snippets.

4. **The footer** (at the bottom of the page) – used for important but non prominent content and resources

Legal information, privacy policy and disclaimers

Additional navigation elements.

The most important consideration for any page layout is the content i.e. what needs to be included, what is the most important action or piece of information, and how can this be structured to meet the user’s needs? After all, web pages are created to support a user’s journey. All pages on your site should not necessarily look identical.

Creating sketches, wireframes and prototypes

Wireframes are the skeletal outlines of the layout of a web page. Their purpose is to map out the placement of various elements on the page as a guide for the designer to create the visual design, and the web developer to create the code and interactivity required. Wireframes can be low fidelity (very rough and basic sketches, barely resembling the final output) or high fidelity (very detailed, complex layouts including creative elements). Any website project will have several wireframes, at least one for each template page. Capture your first ideas on paper; it’s the fastest and best way to capture good ideas.



Figure 5.5.6: Low-fidelity and high-fidelity wireframes *Adapted From UI Wireframes, 2017*

Prototypes are a step up from wireframes, in that they are interactive. Prototypes are essentially sets of wireframes that have been linked together like a website, so that they can be navigated through by clicking and scrolling.

Prototypes are excellent tools for testing the flow and function of a proposed website before diving into the costly and lengthy design and development phases. They can save a lot of time, money and effort by helping to identify problems and improvements upfront. Again, paper prototyping is the best method for fast, iterative UX design.

Assemble the other elements

Once you've defined your content and mapped out the basic layout of each page, you need to add all the extra elements that your website will need. Remember that the page should only ever contain the elements a user might need to support them in their task. These can include:

> **Note**
>
> Paper prototypes make testing quick and easy. They're portable, easy to use, and don't require complex tools, Internet connections or user skills. Mobile Apps like Pop (popapp.in) easily turn paper prototypes into clickable demos. See section 5.8, Tools of the trade for more information on the Pop App

Calls to action. CTAs can take a variety of shapes and forms, from in text links to large buttons.

Forms. These are interactive fields where users can enter their contact details or other information, for example, to sign up for a newsletter or enter a competition.

Search. Many sites can benefit from having a search function, both to help users navigate and to make finding specific information easier.

Calls to Action

Successful CTAs are simple, quick, clear actions that don't require the user to do anything scary or to make a commitment. They should always do exactly what they state in order to instil confidence and clarity. It's all about managing user expectations, do they actually go where they think they will, or perform the action users expect?

Positioning

The primary CTA should usually appear above the fold to capture the attention focused here. Other CTAs can appear below the fold, and the main CTA can also be repeated lower down.

Prioritisation

A single web page can be built around one CTA, or could incorporate a wide range of possible desirable actions. This all comes down to what the page and website overall is seeking to achieve, based on the business requirements.

When multiple CTAs are used, there should be one primary one that stands out strongly and the others should be more muted, playing a supporting role. CTAs can be differentiated through colour, shape, placement and size; the fewer choices, the better.

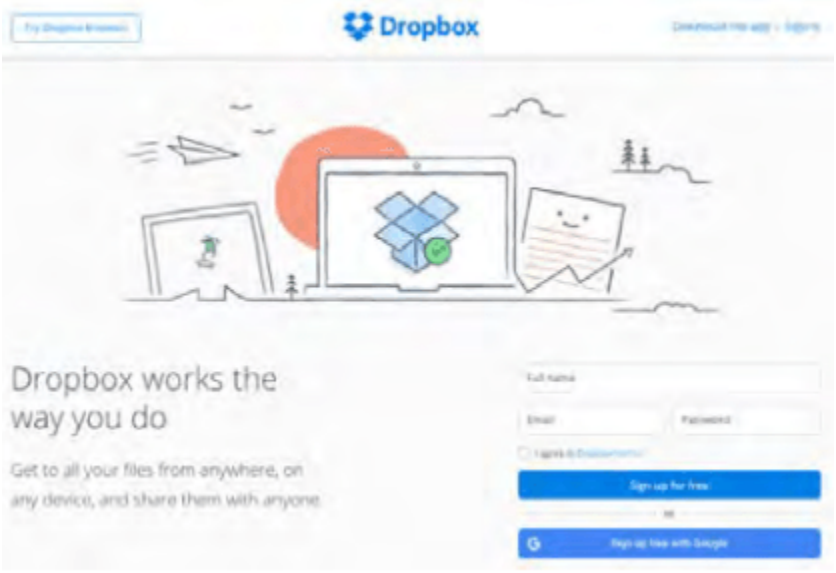


Figure 5.5.7: The Dropbox website has a clear primary CTA in blue for 'Sign up', and a secondary 'Try Dropbox Business' in the top right *Adapted From Dropbox, 2016*

Clickability

Any CTAs that can be clicked must look tactile or touchable. This means they must stand out somehow from the background and from static elements. One approach is to make the button look like a real button, standing out from its environment. Another train of thought advocates for the flat design approach as a more elegant and modern expression of this.



Figure 5.5.8: Clickable CTA buttons *Adapted From Stokes, 2013*



Figure 5.5.9: Buttons with a flat design *Adapted From Stokes, 2013*

Quantity

Finally, be sure not to overwhelm users with too many choices. Stick to one central CTA per page, making it obvious to users what the main goal, action or outcome of the page is.

Forms

Forms are extremely useful tools for gathering user information and encouraging interaction on the site. Users are generally familiar with them and have some experience filling them out, and there are lots of web conventions that govern how these should be set up. As a general rule, the shorter you make your form, the better. The fewer fields users have to fill out, the more likely they are to complete the process.

Steps and sections

Simple forms with only a few fields can be assembled as a series of boxes. For forms that are longer, for example, those in eCommerce checkouts or complex registration processes, it makes sense to split them up into manageable portions. Manage users' expectations by clearly indicating what the next step is.

Relevance

Simplicity is a key consideration, forms should be as short and clear as possible. The effort must be equal to the reward gained. All of the fields included must be clearly relevant to the purpose of the form, otherwise users may get confused or suspect that you are harvesting their information.

It is important that users are notified about which fields are required and which are optional. If all the fields are required, then the form should indicate this clearly.

> **Note**
>
> Be aware of local laws that define what information you're allowed to collect, and how you can use it.

Assistance

It is a good idea to include help for users filling out forms. This is especially the case where a specific field requires inputs to be entered in a certain way and doubly so for password fields with special rules. Users will not instinctively know the rules associated with specific fields, so you must provide plenty of guidance along the way.

A form should be well designed and intuitive rather than provide tips and text to users on how to complete it. Ideally, users shouldn't need any help at all.

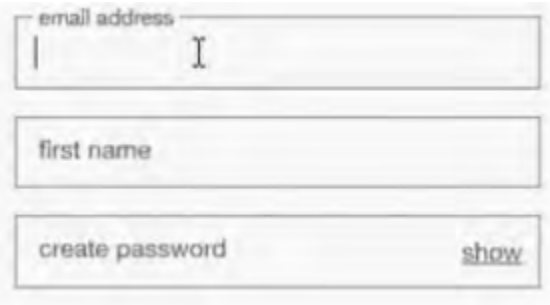


Figure 5.5.10: A newer interactive form that provides assistance to users by moving the label text from being a placeholder to hovering above the field *Adapted From UX Booth, 2016.*

Validation

Validation means giving the user feedback on the inputs they have submitted whether correct or incorrect. Validation can happen at two points, after the user has submitted the form, which is submission validation, or during the process of filling out the form which is live inline validation. Submission validation is essential for protecting the database, but will also assist in catching user errors. Live inline validation usually results in much better user experiences as the users then know that their information is

correct before submitting the form.

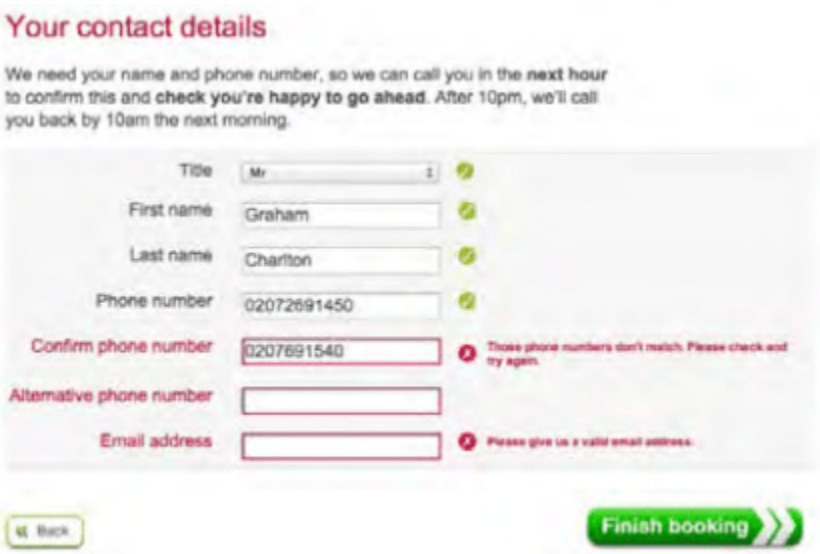


Figure 5.5.11: A simple, intuitive sign-up form that provides clear guidance *Adapted From Econsultancy, 2014*

Error messages are an important part of validation that is shown to users. Error messages are often ignored in UX development and are a huge source of frustration for users.

Some best practice to consider:

- These messages should be easy to understand meaning the user should not struggle to understand the error or how to fix it.
- The error message should stay visible until the error has been corrected.
- The tone of the message should match the rest of the site.
- It is important to remember that a form is a conversation with users. It's an interactive dialogue even though you are not present.

reCAPTCHA

reCAPTCHA is a free service offered by Google that requires users to answer questions to prove they are not bots. It helps to protect websites from spam and abuse, but does reduce conversions and in certain instances can render the site unusable for users. Despite these accessibility issues, reCAPTCHA is still an important factor when developing forms in order to protect your website.



Figure 5.5.12: An example of reCAPTCHA included in a form *Adapted From 9Lessons info, 2014.*

Search

Search has three useful functions on a website. Not only does it help users to find specific things, it also serves as an essential navigation aid for larger sites, and collects valuable data from keyword research about what the user is looking for. From the UX practitioner's perspective, there are some important non-technical principles to bear in mind.

For large sites, it can be useful to allow users to search within categories. On Amazon, for example, you can search just within the category ‘books’.

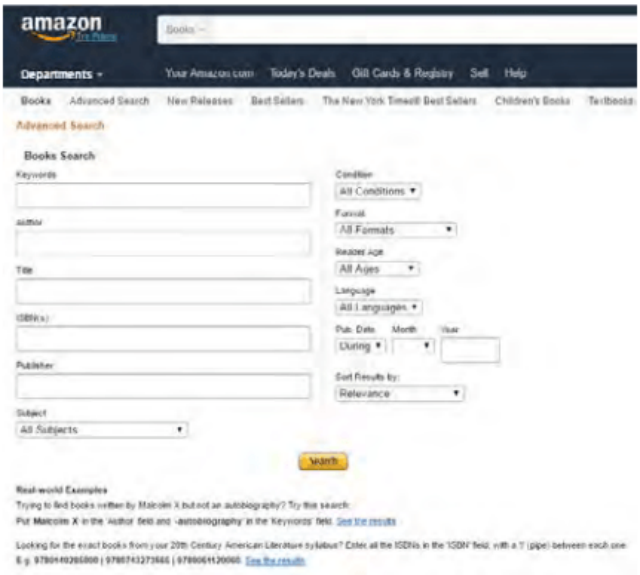


Figure 5.5.13: The advanced search within ‘Books’ on Amazon.com *Adapted From Amazon, 2017*

Positioning

Search will either be the primary starting point for your site, or it will be a useful additional tool. In the former case, for example, on a large eCommerce site such as Amazon, the search tool should be positioned centrally and visibly to encourage the user to use this as the main navigational tool. In the latter case, best practice dictates that it should be in the top right corner, or easily accessible in the sidebar.

Accuracy

The better you can interpret what your user is searching for, the more relevant and accurate the search results can be. Google works very hard to fine-tune its search algorithm to ensure that users don’t just get what they searched for, but what they actually wanted in the first place.

User research can suggest why users would search your site in the first place, and what they would typically be looking for. Popularity and recentness of content are other key considerations.

Results

When it comes to displaying search results, there are a few key questions to ask:

How many results should be displayed per page?

Ten to 20 results per page is generally a good benchmark.

What order should results be in? Most popular first? Cheapest? Newest? Closest match?

This will depend on the nature of the site.

Can results be filtered?

Some websites allow users to do a second search constrained to the results of the first one.

What happens if there are no results?

If no search results are found, the search function should provide hints and tips to the user on how to search better on the site. The fact that there are no results should be stated clearly, followed by a list of the closest match of content to the search query. It's quite possible the searcher didn't know the exact term from what they are looking for or made a typo, though the site should be forgiving of these. Hints could include wildcards or breaking up the terms into smaller pieces. The message shown to users should be helpful and relevant, and not simply copied from Google's advice.

Define the visual design

Before users interact with your carefully considered content, your excellent navigation structure and slick search bar, their first impression comes from the look of the website such as the colours, graphics, and overall design elements. As people are spending more and more time on the web, they are less tolerant of websites that don't look good or credible. While a website is not an art installation, it is a design project, and the fundamentals of good design apply.

> **Note**
>
> Read more about this in the Web development and design chapter

While much of the visual design expertise will come from the graphic designer, it's valuable for the UX practitioner to know the following principles of visual design:

Colour

Colour has an incredible psychological effect on people. Based on our culture, preferences and learned cues, people interpret colours in very specific ways and this can be used to inform and steer user experience. When choosing the colour palette for your website, be aware of legibility and accessibility concerns. Using a lot of open or white space often makes sites appear simple and easy to read.

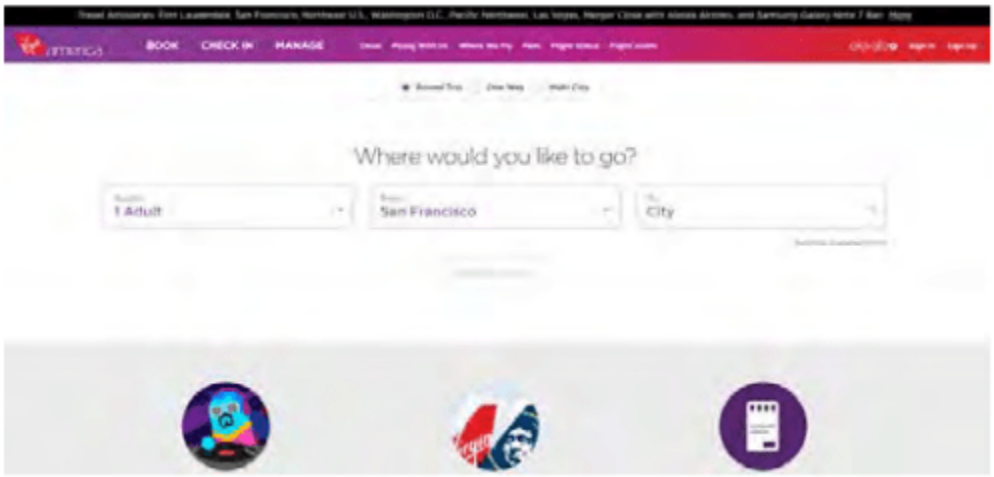


Figure 5.5.14: The Virgin America website places the most important information upfront and uses colour to draw the eye to the important buttons/forms *Adapted From Screenshot. Virgin America, 2017.*

Imagery

The choice of images used on the website can have a massive effect on how users behave and interact on the page. You can never be quite certain which images will have the best results, so this is one area where you will need to do a lot of testing (more on that below). Humans tend to gravitate towards and identify with pictures of other humans. Content strategy should include an image strategy, especially if the site is rich in images. Camera angles, content, brand strategy and the tone of the visuals all need to be considered. Images must always be relevant and not used as fillers or pure decoration.

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5.6: Advantages and disadvantages of UX design

Ensuring you adhere to all the principles of UX design can be costly and time consuming. Testing each development or aspect of the site can be very drawn out. However, the advantages that UX provides far outweigh the costs.

Good UX means users will have a pleasurable experience on your site, are more likely to return and recommend your site, both of which lead to sales and help you to meet your business objectives. Poor UX means users have negative and disappointing experiences; they may not return and may relate their negative feedback to others, which in turn loses any potential sales.

Including UX from the beginning helps to keep costs low and on budget. It is estimated that for every US $1 spent in the initial phases to improve UX, it would cost US $10 to fix during development, and upwards of US $100 to fix after the product is released (Gray, 2016).

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5.8: Conduct Testing

Measuring how successful your UX has been cannot be left until the final website is complete and ready for launch. The key to an effective user friendly site is testing each step of the way during the design, development and implementation process. User testing is crucial to UX.

User testing means giving one or more users access to a website or prototype and observing how they behave when using it. The purpose of this is to discover problems and gain insights that can be used to improve the final product.

The goal of user testing is not to eliminate every potential problem on a website; that's simply not possible, especially if you consider how subjective this can be. The goal is to work towards creating the best possible experience for users by constantly improving and optimising.

The two biggest questions around testing tend to be "What do I test?" and, "When do I test it?" The answers are simple: **Test as much as possible, as often as possible, and as early as possible.**

> **Note**
>
> Of course, in the real world, time and budget limitations will certainly have an impact on how much you can test but our goal should always be to maximise testing, in whichever way you can. Learn more in the Conversion optimisation chapter.



Figure 5.8.1: Iterative UX testing process *Adapted From Stokes, 2013.*

User testing follows a set process:

1. Formulate a question to test
2. Choose a test and prepare
3. Find subjects
4. Test
5. Analyse
6. Report
7. Implement
8. Start again

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5.9: Tools of the trade

UX tools range from rudimentary (pen and paper) to highly sophisticated (web applications and tech tools). Here is a brief roundup of popular options.

Balsamiq (https://balsamiq.com) bills itself as a 'rapid wireframing tool' and is great for creating fun, low-fidelity wireframes and simple prototypes.

Axure (www.axure.com) is an all-purpose prototyping tool that allows you to create fully interactive wireframed websites without needing to code anything. A useful feature is that it also generates technical specifications for developers to work from based on the interactions and links created in the prototyping process.

Gliffy (www.gliffy.com) is a web-based tool that allows you to create a wide range of diagrams, everything from wireframes to sitemaps to charts.

Invision (www.invisionapp.com) is a web based tool that allows you design prototypes across web and mobile.

Morae (www.techsmith.com/morae.html) is a good place to start if you're looking for a web-based replacement for user labs.

Pop (https://marvelapp.com/pop/) or Prototyping on Paper, is a free app for prototyping apps on mobile.

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5.10: Case study - AO Becomes customer centred

One-liner

UX testing increased sales at ao.com, a UK based online large kitchen appliances (white goods) store, by 9.5%,



Figure 5.10.1: ao.com logo *Adapted From Insightdiy, 2015*

The challenge

ao.com was using its senior management's hunches to inform its development roadmap and was not considering customers' needs. The conversion manager knew that to become a market challenger in the online white goods market, the company needed to become customer centred.

The solution

To become properly customer centred, the brand needed to work on identifying true customer needs and tailoring the website to provide the best possible user experience. But how did ao.com go about doing this?

The first step was research. Complex research was carried out by WhatUsersDo.com, an expert in UX testing. Users were asked to purchase white goods online from either ao.com, a competitor, or via Google search. Users were observed via their screens and asked to speak their thoughts as they proceeded.

Those who bought directly form ao.com were monitored to observe friction points in the buying process. Those who bought from competitors were monitored to identify the strengths and weaknesses of competitors, and lastly those using Google were watched so see how users would naturally search to buy white goods.

Next, the videos, over 250 hours of footage, were assessed and shown to senior managers who could now clearly see where customers were having problems with the site. Senior managers now started to look at their business from the customer's point of view and the roadmap was re-prioritised to focus on customer needs.

The results showed that the product pages needed the most improvement. There needed to be clearer product descriptions, more compelling videos and much stronger calls to action. The sizes of images and buttons placement were also adjusted according to the feedback.



Figure 5.10.2: A product page for ao.com *Adapted From Whatusersdo, 2014*

The results

Improved user experience definitely yielded great results for ao.com:

- Online sales increased by 9.5%
- The number of calls to the customer support team was reduced by 33%
- Customer reviews increased by 110% demonstrating increased customer engagement.

The changes made may have seemed obvious, but were not recognised by senior managers. Exposure to real clients and their needs is essential in determining a good user experience. To ensure ao.com maintains their customer centred approach, they run weekly sessions where employees watch how users use their website. Any changes can be made as required in order to continue providing customers with the best user experience possible.

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5.11: The bigger picture

UX touches on so many aspects of digital marketing that it's hard to list them all. It's involved right up front at the strategy and research phase, and then touches on all the create disciplines such as web development, design, copywriting and SEO.

For example, when it comes to SEO, Google's algorithm assesses the UX design on a website as part of the overall decision on where to rank it.

Social media, email marketing, display advertising, video marketing and other fields can also benefit from solid UX thinking such as, "What do users want, need and expect from you on these channels?" Finally, UX goes hand in hand with web analytics data as both disciplines aim to understand users and create real, actionable insights from the data gathered about them.

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5.E: User Experience Design(Exercises)

Case study questions

1. What do you think about the methods ao.com used to test their UX? What other methods could they have used?
2. What elements would you have included in the new improved UX design of ao.com?
3. Why do you think UX research helped increase sales and improve customer engagement for ao.com?

Chapter questions

1. What are the six qualities that make up a good user experience?
2. Are there any mobile specific issues that UX designers should keep in mind? What growing trend should UX designers keep in mind when designing any user experience?
3. Explain why testing is so important with UX?

Further reading

www.smashingmagazine.com – Smashing Magazine posts regular, in-depth articles and research focused on UX, technology and web design.

http://www.lukew.com - The blog of Luke Wroblewski, one of the world's foremost UX experts. It's filled with research and practical advice for working UX practitioners. [Accessed 30 October 2017]

http://ww.sitepoint.com/11-free-ux-e...h-reading-2016 - a list of books on UX that are free and well worth reading. [Accessed 30 October 2017]

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5.S: User Experience Design(Summary)

Users come first when creating any web-based marketing channels. Core UX principles such as user-centric design, web conventions, simplicity and credibility are essential for creating web experiences that are seamless, memorable and valuable to users.

Mobile UX is a special subset of the discipline that takes the unique context and characteristics of mobile users into account – whether for designing a mobi site, an app or a responsive website. When it comes to implementing a UX process, the following steps should be followed:

1. Identify business requirements – what does the business need to get out of the site?
2. Conduct user research – who are you building the site for, and why? What information do they need? How will they move through the site? Does the user need this?
3. Create the basic structure – what goes into solid information architecture?
4. Analyse and plan content – how should content be put together here?
5. Design the sitemap – how will the overall website be structured?
6. Build and develop the navigation – how will users get to where they need to go?
7. Create the layout – what will each page look like, from top to bottom? Does the layout support the functional purpose of the website? What content is needed for this page to achieve its business goals?
8. Add other useful elements – how will CTAs, search tools and forms behave? Where will they be best placed to achieve the business goals?
9. Conceptualise the visual design – how will the visual layer add to the overall UX impact?
10. Conduct user testing – are there any errors on the site, and is it easy to use? Testing should be done at each step in the UX process. The earlier errors or difficulties in the UX are picked up the more cost effective it is to correct and change.

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6: CREATE - WEB DEVELOPMENT AND DESIGN

Learning Objectives

In this chapter, you will learn:

- How the web development process works, from planning through to design and launch.
- Development and design best practices and the principles of designing for persuasion.
- How to assess the quality and effectiveness of web development and design implemented by suppliers or agencies.
- How to evaluate the need for either a static or CMS website.

6.1: Introduction

6.2: Key terms and concepts

6.3: Web design

6.4: Web development

6.5: The web development process

6.6: Development methodologies

6.7: References

6.8: Quality assurance

6.9: Case study - Offspring

6.10: The bigger picture

6.E: Web Development and Design(Exercises)

6.S: Web Development and Design(Summary)

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6.1: Introduction

Websites are, in many ways, at the heart of successful digital marketing. They are your home on the web, a shop window over which you have full control, and often the first place people stop to find out more about you.

Web development and design applies to more than just websites, the principles can be used for any digital assets you create, from mobile platforms to social media profiles.

Creating online assets involves three key processes: planning and design, which create the appearance, layout and style that users see; and development, which brings this imagery to life as a functioning web tool.

> **Note**
>
> Unlike social media properties, your website is not subject to changes in policy, and content remains easily accessible regardless of its age.

The fundamental principle of good development and design is to understand your users, they are the people who will actually be using and interacting with your website. What are they looking for? What are their objectives? Your offering must have user experience central to the process.

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6.2: Key terms and concepts

Table 6.2.1

Term	Definition
Accessibility	The degree to which a website is available to users with disabilities, such as the visually or hearing impaired, and those technically disadvantaged by not having the necessary device, software or browser.
Adaptive web design	Websites that respond to a user's screen size by loading predefined layouts.
Alt text	Alt text means alternative text. The 'alt' attribute is used in HTML to attribute a text field to an image on a web page. It normally has a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. Also called Alt tag.
Anchor text	A text link, or backlink, that refers visitors to your site from another with SEO benefits, passing relevance and authority from the referring site.
Bounce	When users leave a site before navigating from their landing page to another.
Branding (or visual identity or corporate identity)	These terms refer to the look and feel of your brand. In this context it is used when discussing how your logo, colours and styling elements are translated from traditional print-based assets to digital.
Breadcrumbs	Links, usually on the top of each page, indicating where a page is in the hierarchy of the website. Breadcrumbs can be used to help users navigate through the website, as well as act as a page index for search engines.
Cache	Files stored locally on a user's browser to limit the amount of data called from the server on a return visit.
Call to Action	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today etc.). Calls to action are usually styled differently from other copy on a page so that they stand out and draw attention.
Content Management System (CMS)	A software system that allows an administrator to update the content of a website, so that a developer is not required.
Common page elements	Items that appear on every page of a website.
Cascading Style Sheets (CSS)	A programming language that defines the styles such as fonts and colours, used to display text and content. Web pages are one of the places that this language is used.
Client-side	Scripts that run in a user's browser, rather than on a web server.
dpi	Dots per inch (in an image). On the web, the screen resolution is 72dpi.
Graceful degradation	The use of both modern and antiquated web techniques and code to provide a safety net, or fallback, for users with older browsers and technologies.
HTML5	HTML5 is the most current iteration of the HTML (HyperText Markup Language) standard. It is a broad range of technologies that allow for rich media content and interaction on websites that do not require additional third-party plugins. It allows rich multimedia content to be displayed and easily viewed by users, computers and devices.
Information architecture	The way in which data and content are organised, structured and labelled to support usability.
JavaScript	A high-level, dynamic programming language commonly used to create interactive effects within web browsers.
Landing page	The page a user reaches when clicking on a paid or organic search engine listing. The pages that have the most success are those that match up as closely as possible with the user's search query.

Landing page	The website page that a user is sent to after clicking on any link or CTA, for example, in an email or affiliated site, in a display ad, or a paid or organic search engine listing. The landing pages that have the most success are those that match up as closely as possible with the user's search query or intention.
Meta data	Information that can be entered about a web page and the elements on it to provide context and relevant information to search engines. Metadata includes meta and title tags.
Native mobile application	A mobile application designed to run as a program on a specific device or mobile operating system.
Navigation	How a web user moves through a website, and the elements that assist the user in doing so.
Open source	Unlike proprietary software, open source software makes the source code available so that other developers can improve on or build applications for the software.
Plug-in	Often referred to as a module or extension, a piece of third-party code that extends the functionality of a website.
Progressive enhancement	The development of web technologies in a layered fashion, prioritising basic content and functionality for all web browsers, while allowing users with higher bandwidth or browsers access to an enhanced version of the page.
Proprietary software	Any software that one or more intellectual property holders own and licence to others in exchange for compensation, subject to certain restrictions. Licensees may not be able to change, share, sell or reverse engineer the software.
Responsive web design	Websites that fluidly respond to a user's device or screen resolution based on media queries sent between the site and the device regarding the specs of the device.
Search engine results page (SERP)	The actual results returned to the user based on their search query
Server-side	Scripts that run on a server, as opposed to a user's browser
Sitemap	On a website, a page that links to every other page in the website and displays these links organised according to the information hierarchy. While this is often physically available on a website (HTML sitemap), it should also be created as an XML file and included within the Robots.txt.
Universal Resource Locator (URL)	A web address that is unique to every page on the Internet.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
Web application framework	Software used to help create dynamic web properties more quickly. This is done through access to libraries of code for a specific language or languages and other automated or simplified processes that do not then need to be coded from scratch.
W3C standards	A common approach to development that focuses on accessibility and standardisation, overseen by the World Wide Web Consortium (W3C)
Web server	A computer or program that delivers web content to be viewed on the Internet.

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6.3: Web design

Web design is the process of creating all the visual aspects of the interface. This covers the layout, colour scheme, images, logos, type, design elements (such as buttons and links), and anything else that you can see.

The web is a visual medium, so design is an important part of creating assets that are both engaging and effective. Designers need to keep in mind the technical aspects of design, while prioritising the human factor. Digital properties shouldn't just be beautiful. They need to create a good experience for the visitor and meet business objectives, such as increasing sales, creating brand ambassadors, as well as encouraging signups and, ultimately, conversions.

Visual identity and designing for persuasion

The visual interface or, the design of a website, is what user see and interact with. It's the visual representation of all the hard work that goes into developing a website. It's what the site will first be judged by and is the initial step in creating a delightful user experience. It matters a lot.

There is a close relationship between UX and visual design. Ideally the visual designer will use the documents created by the UX designer and add the visual skin, but often the designer has to manage both UX design and visual design. Design is not just about aesthetics, although looks are very important.

Design is about the visual clues we give users so that they know what to do next. It assures web visitors of our credibility and turns them into customers.

Good interface design involves many things, but here are a few basic considerations. These are closely linked to UX, and the visual designer plays a key role in defining them.

- **Navigation:** the signage of the site, indicating to users where they are and where they can go.
- **Layout:** how content is structured and displayed.
- **Headers:** the element with a fixed position at the top of every page. It usually includes all primary navigation items which need to be presented on every page such as main menu, login and search.
- **Footers:** the usually consistent bottom part of the page.
- **Credibility:** telling users that you are who you say you are.

Visual identity

The visual identity answers the question, "How do users know it's us?" Certain design elements should be carried through on all web assets created for a brand, as well as print and traditional communication media. Often, the visual identity guidelines for the web are codified into a digital style guide document to ensure consistency across different agencies, designers and teams. This document can include guidelines for creating all manner of web assets, including banners, social media content, and website design elements.

The logo is the most prominent way to reinforce your brand identity on the website. The logo is part of a brand's corporate identity (CI).

The primary font is typically used for prominent headings on the site, while body copy is often set in a standard web font that closely matches the primary font.

Menu and button style, as well as icons, are also part of a site's visual identity. Even when a user is viewing a small part of a site or page, it should look as if it belongs to the site as whole.



Figure 6.3.1: An example of a brand's visual identity *Adapted From Designspiration, 2012.*

Design theory

Design can be a pretty precise science and there is a lot of research on what makes for effective design. A lot is also common sense and practice based on accepted web standards. Design theory is discussed in the User experience design chapter.

Collecting and collating design assets

Elements such as your logo and brand colours represent your brand and form part of your brand expression. The latest versions of these brand assets need to be available to the designer or marketing agency designing your website.

Getting the right brand assets to designers in a good quality format that they can easily access saves time and avoids expensive mistakes. Here is a list of brand assets that a designer requires to start working on a site. The quality, format (or file type) and file size are all important considerations. You need to provide:

> **Note**
>
> The brand guidelines or style guide would be created in Illustrator, PS or Sketch, but saved for the client as a PDF doc.

- **Brand guidelines or style guide.** In Adobe Reader (PDF) format.
- **Logo and other key brand elements.** These could be in Illustrator format (ai) or Photoshop format (psd). Best practice is to have your logo designed using vector graphics. If your logo or other brand assets are created in this format, they can be enlarged without losing quality. If you do not have a vector version of your logo available, then you should make sure that your image is at least 1 000 pixels wide.
- **Image libraries.** Photographs and images can be hosted online, where the designer can access them with a login. They can also be sent via Cloud file sharing services. Make sure the images are of sufficient quality. It is best practice to provide images that are 300dpi. Although all images on the web are displayed at 72dpi, a higher quality image will give your designer room to optimise and resize and crop or cut images where needed. It may also be necessary to consider different images for mobile vs. desktop because the viewpoint on mobile is so much smaller. You may need to consider using much fewer images for mobile or even none at all.

> If you do not own the image and its copyright, it is illegal to use the image on your site without permission from the owner. If you require these images, they can be purchased from stock libraries online such as iStock or Shutterstock. Avoid using images from Google Image Search on your pages.

- **Fonts folder**. You will need to provide both Apple Mac and PC versions of the fonts that are listed in your Style Guide. Many designers work on Macs, which use different font versions from those read by PCs.
- **Brand colours** need to be given to digital designers in RGB format. RGB stands for red, green and blue and is the standard for colours online.
- Any **existing creative** assets that have been created for your brand over time, such as:
  - Print designs
  - TV ads

Website copy should be made available before the final design is required. This prevents delays caused by designers waiting for material. This applies to any additional assets your designer may need that can be downloaded or sent, such as your price guides or product descriptions.

Fonts

Copy conveys your brand message to your client or customer and should be easy to read and search engine friendly. The CI is expressed through fonts, also known as typefaces.

Typographic layout can draw attention to the content users should see first. Indicate which pieces of information take precedence. Importance can be signified by text size, colour, weight, capitalisation and italics. Placement also contributes to how important text appears.

Some fonts are common to all computer users. These fonts are known as web safe fonts. Anyone accessing websites that use these fonts will be able to view them as the designer intended and search engines will be able to search these websites easily.

Note

Some web safe fonts are: Times New Roman, Arial, Helvetica, Courier New, and Lucida Console. See the full list here: www.w3schools.com/cssref/ css_websafe_fonts.asp.



Figure 6.3.2: Examples of web safe fonts *Adapted From Stokes, 2013.*

To drive impact, designers typically prefer not to be limited to using only web safe fonts, and brand guidelines in most instances don't take web safe fonts into account. This means that fonts must be embedded by a developer using tools such as Typekit, or loaded dynamically from tools such as Google Fonts.

Note

You can also use Google Fonts as an alternative, which are more stylish than standard fonts but which are still viewable by most people. The developer will need to implement these. See www.google.com/fonts.

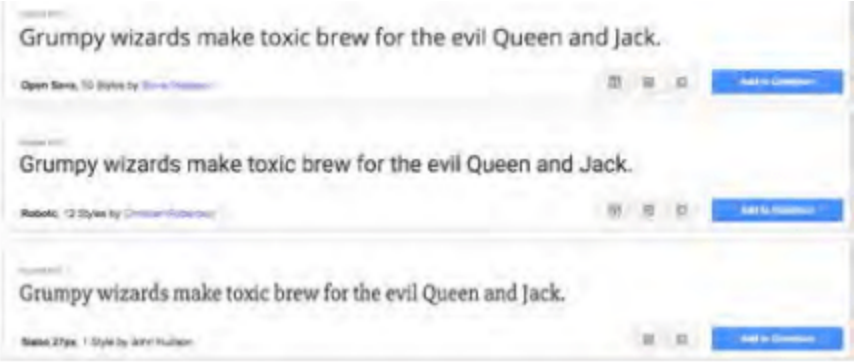


Figure 6.3.3: Example of Google Fonts *Adapted From Stokes, 2013*

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6.4: Web development

Web development is the process of taking finished web designs and transforming them into fully functioning, interactive websites. Development is what gives life and movement to static designs, and enables users to access the website through their web browsers. This is done by translating the designs into web coding languages that can be interpreted and displayed by web browsers.

Learning to code your own website is not in the scope of this textbook and requires years of practice and some considerable technical know-how. But we can teach you to understand the aspects that go into creating a website, the process that should be followed, and how to help in making key choices about your website.

Assessing your development needs

It is important to identify what your development needs are as these fundamentally impact the options that are most appropriate to your site's development. Will you use a CMS? Will you need complex content management? Is it for eCommerce, or is it simply a brochure site? For instance, if you're building a small brochure site, you don't need someone to come up with a bespoke development solution.

Content management

The majority of websites today are built using a content management system, or CMS. Content management simply means a system for managing any forms of content. A web CMS is a software application that assists in managing your digital assets and content for your website. It needs to facilitate the creating, collecting, managing and publishing of any material for your site.

Managing a website is collaborative and involves various people, in various roles, working on the material, such as creators, editors, publishers, administrators and even visitors to your site. A CMS provides tools to allow users with little knowledge of web programming languages or markup languages to create and manage website content. A CMS enables a business to manage and update their own website without needing a web developer (Johnston, 2015).

Ideally, the CMS becomes a set of automated processes that facilitate the functioning, updating and management of your site. Using a CMS means it is cheaper and easier to update, manage and create new content as web developers are not required for each change. A CMS also allows for the content of websites to be updated from any location in the world by means of signing in to the system.

eCommerce

eCommerce, or electronic commerce, refers to any trading of products or services on the Internet. eCommerce sites are necessary across a range of businesses, from consumer based retail, through auction, music and video subscription sites, to intercorporate trading.

Learn more in our eCommerce chapter.

Brochure site

A brochure site is a static site. It provides content that does not need to be updated regularly, and there is very little interaction with the visitor. A brochure site is essentially a brochure of a company's offering, providing relevant information and contact details to prospective customers. The site does not 'do' anything. The user cannot interact with the site in any way; they are unable to place orders, make payments or engage with the site.

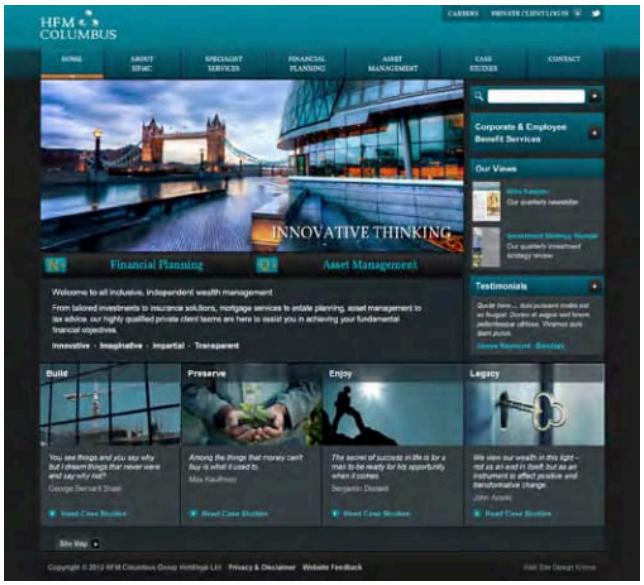


Figure 6.4.1: Static brochure site *Adapted From HFM Columbus, 2017*

Brochure sites are a means of getting your business an online presence quickly and relatively cheaply, and if it meets all your business requirements then such a simple site may be sufficient. Consider the limitations of a brochure site before making a choice, as they can be difficult or impossible to build on later.

Development options

When selecting how to proceed with your website development, you have a few options at your disposal. The choice between an off-the-shelf solution and bespoke development comes down to how flexible the off-the-shelf solution is. If too much customisation is required, or it does not support the business' requirements, it may be better and cheaper to develop a bespoke solution.

Off-the-shelf solution

The CMS you choose can be pre-built by an external company or developer. This can be bought like any other software on the market. While this option may provide fewer custom features, it's potentially a more cost-effective option than a bespoke CMS. It is certainly quicker if little customisation is required.

Bespoke development

This involves a CMS that is built specifically for a certain website. This option is highly tailored and customised to your website, and can be more expensive than other options. It is possibly less future proof, as finding alternative agencies to support custom-built code is challenging.

Advantages and disadvantages of off-the-shelf and bespoke development

Table 6.4.1 (Cooper, 2015)

Off-the-shelf		Bespoke	
Advantages	Disadvantages	Advantages	Disadvantages
Cheaper	Overly complex with large sections you will never use	Created specifically for the business' needs	More expensive

Sophisticated software due to wide range of resources input for development	Compromise of features	Tailored and unique	Requires experienced developers to maintain
Easy to find support and literature widely available	Long time to learn and in-house training required	Customised to interface with software you already use	Less future proof as tied to specific agency to maintain
Easy to share files as software widely used and available	Workflow may have to change to meet software design	More intuitive to your business' way of working	Large investment of time for development, testing
No company time needed for specs and testing	Features you need may not be available	More flexible, can be modified and changed as required	Takes much longer to implement
Available sooner	Individual requests to overall developers will not carry weight	Receive better support	Difficult to get support if developer does not provide it
	Long time to have things fixed if through the corporation that developed the software	Provide significant business advantage	Difficult to choose appropriate developer that will provide reliable and stable software.
	Difficult to gain competitor advantage	Option to sell application to others (if you own rights)	

Open source vs. proprietary

There are many open source, pre-built CMS options available, some of which are free. Open source means that anyone can see the code that the CMS is built with, and can manipulate or improve it and share this with everyone else using the CMS. An open source CMS can be more rudimentary than paid options, but is also easy to tailor to your needs, and there is often a community that can create the solutions you need.

Some widely used open source CMS solutions include:

WordPress (www.wordpress.com)

Drupal (www.drupal.com)

Blogger (www.blogger.com)

Joomla (www.joomla.org)

Table 6.4.2 (Robbins, 2015)

Proprietary		Open source	
Advantages	Disadvantages	Advantages	Disadvantages
Predictability	Less current so large investments in legacy systems	Customisation	Upfront cost can be high if you want highly customised product
Plenty of options	Licensing fees	Flexibility	Less 'Out of the box' features and features you need may be expensive to create
Robust and filled with features	Supported only by the company that sells it or its agents	Supported by an online community and not a company	Less predictable support which only happens as needed and not regularly

Relatively cost effective to implement	Lack of customisation	Existing frameworks to work from	Less predictable
	Lack of flexibility	New technology helps to stay up to date with bugs and fixes	
		You own the customised versions	

A CMS should be selected with the goals and functions of the website in mind. A CMS needs to be able to scale along with the website and business that it supports, and not the other way around. Many content management systems have become famous for certain needs.

Examples include:

- WordPress for personal blogs or brochure type sites
- Drupal for more complex community and publishing sites
- Magento for eCommerce sites.

Development frameworks

The back-end of a website refers to the server-side layer. This layer is hidden from the user's view. The interaction between the user and the back-end is handled via a presentation layer known as the front-end or client-side layer. A website is a marriage between these layers (Ferguson, 2016).

Back-end/server-side languages and frameworks

Server-side languages are the hidden web coding languages that determine how your website works and communicates with the web server and your computer.

When choosing a server-side language, you need to consider:

Cost: The cost varies depending on the language you choose for your web development project, as some are more intricate than others, the developer may charge more. So the language chosen may directly influence the salary of the developer. If information is processed where your website is housed, as opposed to on the client's computer, it increases the costs. Some languages also require ongoing website management and maintenance, which is an additional cost to consider.

Scalability: When planning a project where scalability is a factor, consider whether there are developers readily available to develop in this language. Also find out if there are supporting libraries and frameworks available that may suit possible changes to your project.

Some of the most common and popular server-side languages include PHP, Java, Ruby, .NET and Python. Ask your web developer to advise you on the best language for your specific project (Ferguson, 2016).



Figure 6.4.2: Logos for some popular back-end developing languages *Adapted From Lotusnotus, n.d.*

Some common back-end frameworks are Django, Zend Framework and Ruby on Rails.

Front end/client side development languages and frameworks

> **Note**
>
> There are many free resources online that teach you how to code. One is Codeacademy: www.codeacademy.com

Web users have come to expect rich, interactive experiences online, and interactive website interfaces are a part of that. Front-end languages, or client-side languages, are languages that are interpreted and executed in users' browser rather than on the web server.

These experiences range from simple animations through to highly responsive interfaces that require input from the user. There are several technologies available to create such experiences, each with its own opportunities and challenges.

As with server-side languages, you need to consider a few properties of the front-end language you want to use. Bear in mind that server-side languages and front-end languages are often used together, as all web projects require front-end languages for development.

Cost: Front-end language development costs are comparatively lower than backend costs; although rich interface developers often demand premium rates.

Features: HTML, CSS and JavaScript open source languages are often used together and are compatible with most hardware and software. Content developed in these is also more search engine friendly. Today, Flash is rarely used despite its interactive multimedia capabilities. In many cases, richer experiences can be achieved with HTML, CSS and JavaScript. What your end users will be able to view should always be the most important consideration.

Scalability: Depending on the capabilities of the device executing the language, certain features may not be available or certain code may run too slowly to create a good user experience. The development of front-end code needs to take all the considered devices into account.

Browser and OS support: With front-end languages, you have to cater for browser and operating system support. A website will look different on each browser and operating system, and this needs to be factored in. If a feature cannot be displayed under certain conditions, workarounds have to be implemented. This is typically the case for older versions of Internet Explorer.

Open source or proprietary software: Any developer can create add-ons for or improve on open source software, while proprietary software is owned and its use is restricted. It can be cheaper to develop in an open source front-end language such as HTML, but as HTML is needed to host all web pages, combinations of open source and proprietary software are sometimes used. However, in most cases and for the languages we cover this is not a major consideration.

There are several front-end language options to choose from although the most popular by far is HTML coupled with CSS and JavaScript.

HTML5

HTML is the language for creating websites, and HTML5 is the fifth iteration of the language. It is also the name for a range of technologies that enable modern web browsing features. It's a specification published by the web standards body, W3C, describing what features are available and how to use them. HTML5 is different from proprietary web software such as Adobe Flash in that the specification is the result of contributions from many organisations and can be implemented by anyone without having to pay for royalties or licensing fees. You do, however, pay for the development tools provided by the companies.



Figure 6.4.3: The HTML5, JavaScript and CSS logos *Adapted From Codecondo, 2016.*

HTML5 simplifies many common tasks when building a web page, such as including multimedia content, validating forms, caching information and capturing user input data such as date and time.

HTML5 allows browsers to play multimedia content without the use of Flash or a similar plug-in. There is also a technology called Canvas, which allows developers to create rich, interactive experiences without the constraints that came with previous versions of HTML. For example, a 3D animated video can now be played, something that used to require the use of Flash or Silverlight.

The goal is a website that just works, without the need for particular browsers or plug-ins to enable certain functionality. Having a standardised way of implementing common features means that the web is open and accessible to all, regardless of competency.

CSS

CSS stands for Cascading Style Sheets and is a style sheet language used to instruct the browser how to render the HTML code. For example, the plain text on a web page is included in the HTML code, and CSS defines how it will appear. CSS can set many properties including the size, colour and spacing around the text, as well as the placement of images and other design-related items. CSS pre-processors such as LESS, SASS and Stylus are also available to make CSS more easily maintainable and scalable. They allow for more functional CSS compilation. The latest standard of CSS is CSS3. It is backwards compatible with all versions of CSS and provides many more useful features such as text effects, 2D/3D transformations and animations to name a few (w3schools, n.d).

JavaScript

This is the most common client-side language used to create rich, dynamic web properties. Because it is an open source language, many developers have added functionality that can be more quickly implemented. For example, there are over 1 000 different gallery systems created by JavaScript developers for JavaScript developers.

Flash

Adobe Flash is a language for creating rich, interactive experiences. It supports video and is often used to create game-like web experiences. Although widely supported by desktop browsers, it has limited (and lessening) support on mobile devices and is not usable on Apple devices such as the iPhone and iPad. It has a history of being problematic for SEO, although there are ways to work around much of this.

Flash usage has been on the decline since some security holes were exposed, and many believe that it is on its way out. In February 2016, Google announced that its advertising networks, AdWords and DoubleClick, would no longer be supporting Flash. The ads would have to be updated to HTML5 (Google AdWords, 2016). YouTube announced that it would not be using the Flash

player by default anymore. It switched to HTML5 for all the latest browsers. Adobe discontinued Adobe Professional CC and released Adobe Animate CC which is now Adobe's premier tool to support HTML5 content. There are still a few traces of Flash left as it is still used as a video player and for the creation of online games.

Frameworks

Frameworks are packages that are made up of a structure of files and folders of standardized code (HTML, CSS, and JavaScript for example) which can be used as the basis for developing websites. Essentially, frameworks are templates to provide the common structure for websites so that developers don't need to start from scratch each time. Frameworks save a lot of time and money.

Some examples include Backbone.js, AngularJS, EmberJS, React.js and the very popular jQuery libraries. Bootstrap is also increasing in popularity as a front-end framework.

Development best practice

Meta and title tag customisation

The CMS you have either selected or created should allow you to enter your own meta tags for each page, as well as allow full customisation of title tags for each page. It is important to note that Google does not use keyword meta tags for ranking anymore (Lincoln, 2015).

URLs

Instead of using dynamic parameters, the CMS should allow for clean URLs by using server-side rewriting. Clean URLs consist only of the path to a webpage without extra code. A clean URL could look like this: example.com/cats, while an unclean URL could look like this: example.com/index.php?page=cats. It should allow for the creation of URLs that are:

- static
- rewritable
- keyword rich.

Be careful when building clean, descriptive and dynamic URLs from CMS content. Should you use a news heading, for example, 'Storm', as part of your URL (www.site.com/cape/storm) and someone changes the heading to 'Tornado' (www.site.com/cape/tornado), this will alter the URL and the search engines will index this as a new page, but with the same content as the URL which had the old heading. Bear this in mind before adding dynamic parameters to your URLs.

Customisable navigation

A good CMS will allow for flexibility when creating the information architecture for a website. For the purposes of adding additional content for search engines, a CMS should not require that all content pages be linked to from the home page navigation. Responsive considerations also need to be in place for mobile devices.

The CMS needs to have good support for managing SEO considerations such as URL rewriting and avoiding duplicate content issues.

Customisable image naming and alt tags for images: A good CMS will allow you to create custom alt tags and title attributes.

robots.txt management: robot.txt files are .txt files that restrict search engines from indexing certain pages of information Ensure that you are able to customise the robots.txt to your needs, or that this can at least be managed using the meta tags.

Finally, using a CMS that supports standards compliant HTML and CSS is very important, as without it, inconsistencies may be rendered across various browsers. It also ensures faster loading time and reduced bandwidth, makes markup easier to maintain, supports SEO efforts and ensures that every visitor to a website, no matter what browser they are using, will be able to see everything on the site.

Developing for multiple screens

> **Note**
>
> Read more about this in the User experience design chapter.

Accessing the Internet has changed drastically over the last few years. Desktop is no longer the only or even primary means of accessing the web. Mobile Internet usage surpassed desktop in 2014 and continues to grow year on year, while desktop usage is declining (Chaffey, 2016).

Because of this, it's important for all brands to be accessible on mobile devices. As you learnt in the User experience design chapter, mobile devices can fall into a range of categories, and not all mobile devices have the same features and screen size. This means that websites need to be designed to be accessible and are optimised for a variety of screen sizes and devices.

Developing for a variety of screens and mobile requires an understanding of the opportunities and challenges presented by mobile technology. Challenges include the obvious, such as a smaller screen and navigation limitations, different operating systems as well as more complex issues such as file formats and bandwidth restrictions.

Mobile devices

A mobile device is a small device with computer-like functionality. It allows for an Internet connection and various features such as Bluetooth, NFC, Wi-Fi and GPS. These include smartphones and PDAs (MDN, 2016). Remember, mobile goes beyond just the mobile phone, also consider tablets, game consoles, netbooks, wearables and a range of other web-enabled devices.

The constraints with developing for a range of devices [c head]

Due to the size constraints of mobile device screens, various considerations must be taken into account to allow your website to render correctly.

Fluid CSS layouts will allow the site to manipulate its contents based on screen size. Additionally, CSS media queries can use target styles for a specific screen width, height and pixel density.

Working with touchscreen means that no hover effects will work. Adequate space must be allowed around inputs due to the touch-area of some user's fingers being larger than a mouse cursor.

Images must be optimised for mobile screens and bandwidth restrictions.

> **Note**
>
> A great online JPEG/ PNG compression tool is tinyPNG.org. Simply upload your images and let them compress it for you (MDN, 2016).

Development approaches

Specialised mobile development

Mobile devices allow users to access information about your brand on the move. Because mobile penetration is so heavy and many users worldwide will access the Internet first and primarily through mobile (Chaffey, 2016), every website needs to be designed with the mobile device in mind. Mobile website interfaces demand a simpler approach and a consideration of screen size and input method. A specific design for various mobile screen sizes in the form of an adaptive design may be an option. However, Google prefers responsive to adaptive sites, so creating an adaptive site may not be within the best interest of your business in terms of SEO.

A native mobile app is software designed to help users perform particular tasks. Examples include a tool for checking the weather, a fuel calculator, or an airlines app to check-in or to track flight progress.

Mobile apps can be sold or made available for free. Many developers create apps to derive an income, while free apps that offer users value are often sponsored by brands or advertising. An app can be an excellent tool for connecting with your customer.

The key difference between native applications and mobile-optimised websites is that native applications are designed for particular handsets and operating systems and have to be downloaded to the mobile device. Whereas mobile-optimised websites can be accessed using any Internet-enabled mobile device. That said, mobile apps can allow for more integration with the device and hence a better user experience, depending on the complexity of the functionality.

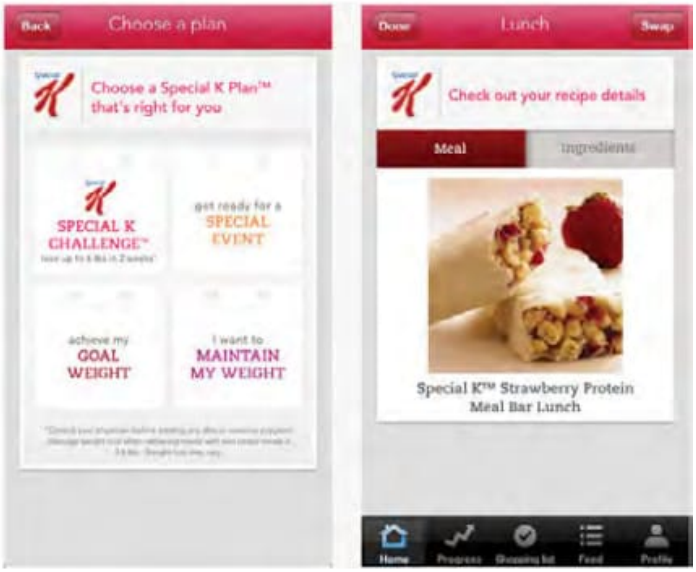


Figure 6.4.4: An example of a branded app from the iTunes App Store *Adapted From Screenshot, Kellogs branded app in itunes store, 2016*

It is a good idea to focus on mobile-optimised sites when targeting a broader group and building an application when wanting to reach a niche or targeted audience.

> Some brands still create a separate mobi site just for their mobile users, but this is falling out of fashion as Internet access via mobile increases. Google recommends responsive sites as best practice.

> **Note**
>
> Read more about mobile-optimisation in the Mobile channels and apps chapter.

A responsive site

A responsive website is a website that changes its layout depending on the device it is displayed on so it looks one way on a desktop computer, but then adapts to the smaller screen size and layout on a tablet or mobile phone. In this way, a single development project can cater for multiple device form factors.



Figure 6.4.5: Responsive web design across a range of devices *Adapted From Interaction design foundation, 2017*

A responsive website is not the same as an adaptive website. A responsive site uses the browser's screen space to determine how to reflow the original design content that was probably optimised for desktop, while an adaptive site provides a specifically tailored design for the device you are using. Designing an adaptive site requires multiple fixed layout sizes, usually the six most common screen widths, and the relevant one is deployed depending on the screen size of the device.

Many users prefer responsive design as it provides familiarity, uniformity and seamlessness, which are important considerations in user experience (Soegaard, 2016). Responsive design should be mobile friendly. This helps to maintain usability when reflowed for a mobile device's screen.

Adaptive designs are more labour intensive and more expensive. As an approach it's being used less and less. Although industry professionals often prefer adaptive sites, industry preference won't translate into higher listings on SERPs while Google's ranking methodology favours responsive design.

Note

Try visiting http://roxik.com/cat/ and resize your browser to see the cat change shape based on the screen width. This is a great illustrative example of a fluid responsive layout.

Creating a responsive website means you only need to build one website for the full range of devices, from desktop to mobile. This can be a technically challenging exercise and will require a lot of planning upfront to make sure that the site displays correctly on each device.

Here is a table that compares the relative strengths and weaknesses of each option. There's no right or wrong answer on which one to pick. Choose the option that best suits your brand, target audience and digital objectives.

Table 6.4.3

	Strengths	Weaknesses
Mobile-specific adaptive sites	• Design best suited to screen size • More aesthetically pleasing and provide better UX • Fully optimised for mobile	• Google prefers responsive sites • Need at least 6 different specific screen-size designs • Expensive • Labour intensive

Native app	• Versatile and creative tools can be created • Interactive and fun • Can create real added value through innovative approaches not possible via a web browser • Ideal for frequently repeated or routine tasks • Promote brand loyalty • Enables access to core phone functions such as GPS, camera, etc. • Could generate income as a 'paid application' • Performance benefit in some cases	• Doesn't work on feature phones • Different versions needed for different phone makes and models • Entirely different and complex development process • User needs to choose to download them • Users without additional phone storage may not have enough space to install the app • All apps must go through formal app stores, and need to be approved in some instances • Changes need to be released through version updates
Responsive site	• Device is an'agnostic' solution • One consistent site accessible across many devices • One data set to work from • Future-proof option that will work on most devices • Preferred by Google and scores highly in algorithms for SEO • Users prefer the uniformity and consistency from responsive sites used across devices	• Could be complex to develop • Site needs a lowest common denominator approach to cater for all devices • May not work correctly on all sizes and shapes of devices • No agreed standard way yet to develop responsive sites

Designing for multiple screen sizes

Designing a site that will display consistently across multiple devices and screen sizes is difficult, but understanding and sticking to web standards will bring you closer to this goal.

Design your site so that the information your users want is not only on display, but also easy to get to. The limited screen space is valuable, so you can't necessarily have the full site navigation on every page. Well thought-out information architecture is essential to ensuring you make the most logical use of navigation in line with what your site visitors need.

Standards

There are few standards currently in place to ensure your design will be optimised across multiple screens. Creating content including images, text and beyond that can be correctly formatted on most mobile devices, or at least legible on phones where formatting is flawed, is still not entirely possible. There is therefore a certain amount of trial and error involved in designing a site optimised across a variety of devices. The process is certainly worth it, though, considering that there are 4.7 billion unique mobile subscribers, and the majority of these are accessing the mobile web (GSMA Intelligence, 2016).

> Web standards are managed by the **W3C**. The standards were created to promote consensus, fairness, public accountability and quality. Complying with web standards means the site uses valid code and adheres to stipulations from the W3C. Read more about web standards at https://www.w3.org/standards/ about.html.

Mobile handset emulators allow you to see how your work-in-progress website will be formatted, depending on which device you are emulating. It has been suggested that nothing can replace testing on actual mobile devices, so if you are doing the testing, recruit contacts with different handsets to show you the difference in display. Some emulators:

- BrowserStack – www.browserstack.com
- TestiPhone – www.testiphone.com
- Mobile phone emulator – for Samsung, iPhone, BlackBerry and other - www.mobilephoneemulator.com

Safari on the iPhone can be tested with IOS simulator.

Responsive design

Responsive websites are designed for a range of screen widths. When deciding whether to create a responsive site or adapt desktop sites, consider your customer first:

- How much of your website traffic comes from specific mobile devices? If this is a large percentage, consider building a responsive site designed for optimal viewing on mobile screen sizes.
- Do your desktop users have the same goals as your mobile users? Here you need to keep in mind your CTAs, drop down menus and the like and ensure they can be accessed correctly by the relevant device.
- What is your budget and how quickly do you need your website to be built? Responsive websites take a while to build and can be expensive. You could save money long term by going this route, but there is a sizeable upfront investment.
- Do you have an existing site, and can it be converted into a responsive website, or will it need to be rebuilt (Du Plessis, 2012)?
- Responsive design comes with a fair bit of terminology, but you should be familiar with three key concepts.

Flexible grid

Typical websites are designed as large, centred, fixed-width blocks. With responsive design, the page elements such as the heading, the text or copy, the main image, and other blocks of information are arranged in a grid of columns that have predefined spacing. Each element relates proportionally to the other elements. This allows elements to rearrange or resize in relation to each other whether the screen is tiny or huge and the screen quality is high or low. Although this system allows for flexibility, an extremely narrow screen can cause the design to break down. In this case we can make use of media queries.



Figure 6.4.6: Flexible grid used in responsive design. *Adapted From igentics, 2017*

Media queries

Media queries are bits of code that allow websites to ask devices for information about themselves. The website style that will suit the device best is then selected from a list of styles defined in a CSS. Media queries ask for information about the device's browser window size, orientation (landscape or portrait) and screen display quality.

Note

Is responsive design right for your company or client? See how some companies tackled this question here: www.zdnet. com/ does-yourcompanys-websiteneed-responsivedesign-70000021417

Flexible images

Images are designed to move and scale with the flexible grid. How fast the website loads is an important consideration, so high-quality images are made available for larger screens and lower-resolution images are made available for smaller screens. Parts of images can also be displayed for smaller screens to maintain image quality. Images can even be hidden completely. Image optimisation is done in CSS, which queries the screen height, width and pixel ratio of the device and then adjusts the images accordingly (MDN, 2016).

For more information about responsive websites watch Methods for mobile (Responsive vs. Adaptive) from Brian Wood Training: https://www.youtube.com/watch?v=IgojC1D3QpU [Accessed 30 October 2017]

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6.5: The web development process

This section discusses the process of building a website from the client's perspective.



Figure 6.5.1: The web development process

Step 1: Discovery and planning

Planning a website starts with research of your market, your users, your competitors and your business. If you already have a website, you can use existing web analytics data to understand how well you are meeting your users' needs. It's also worth running some user labs to watch how users interact with your existing site. Have a look at the Market research chapter for a detailed discussion of this.

> **Note**
>
> Read more about this in the Market research chapter.

Key questions you need to ask.

Business: What are your business objectives? How should this digital property help you to achieve those objectives? (For example, should it generate leads for you to follow up on? Is it an eCommerce store?)

Users: Who are your users, your potential customers? What problem does your website need to help them solve? For example, to collate travel information in one place, such as with www.tripit.com. [Accessed 30 October 2017]

> **Note**
>
> Read more on users in the User experience design chapter.

This research helps you to plan your website strategically, ensuring that it is aligned with both user needs and business objectives.

In research and planning, you should also reach an understanding of what tasks or actions users need to do on your website. These are usually in line with your business objectives. Some tasks a user may need to do include checking the availability of a hotel, signing up to a newsletter, or printing information.

Before any web design project starts, decide what browsers, operating system and devices you will develop for. Usually for browsers you use the latest, plus one before. For devices, iOS and Android are quite different so if you are optimising for both this can be quite expensive. Technology moves so fast, you cannot keep up with all the latest OS and devices.

Choosing a domain name

Domain names are important. They are part of the URL of a website. A domain name looks something like this: www.mycompany.com

A lot more information can be included in this. Domain names can carry the following information: subdomain.domain.tld/directory

Domain – the registered domain name of the website

Subdomain – a domain that is part of a larger domain

TLD – the top level domain, uppermost in the hierarchy of domain names

directory – a folder to organise content

The TLD can indicate the country in which a domain is registered and can also give information about the nature of the domain.

com – the most common TLD

co.za, .co.uk, .com.au – these TLDs give country information

.org – used by non-profit organisations

.gov – used by governments

.ac – used by academic institutions

Domain names must be registered, and in most cases there is a fee for doing so. Many hosting providers will register domain names on your behalf, but you can also do it yourself.

Domain names should be easy to remember, and if possible, include important search keywords for your business. For example, if you were building a website for your restaurant named Omega, www.omegarestaurant.com could be a better choice than www.omega.com as it contains the important keyword 'restaurant'.

UX and content strategy

You also need to gather, analyse and map out what content is needed on the website. This content is then structured in a process called information architecture. A sitemap should reflect the hierarchy of content on the website and the navigation (how users make their way through a website).

> **Note**
>
> Read more about this in the User experience design chapter.

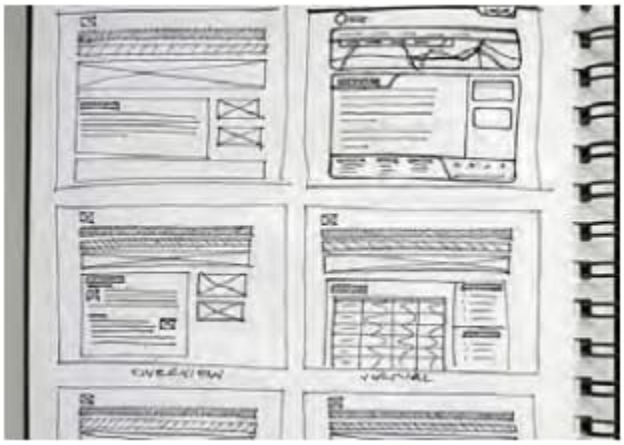


Figure 6.5.2: A sketched wireframe of what the webpages will look like and how they will link to one another *Adapted From Onextrapixel, 2010*

Note

See this link (designmodo. com/wireframingprototypingmockuping/) for a good explanation about the differences between wireframing, prototyping and mocking up.



Figure 6.5.3: An example of a wireframe against what the final website looks like *Adapted From Wirify, 2017*

At the same time, consider what content you want to include on your site. Will it be a relatively static site that doesn't change often, or will you need an editable CMS to regularly add and update content, such as blog posts, images and products?

Note

Have a look at the discussion on choosing a static versus a CMS website earlier in this chapter

Should the website be large enough to require it, a functional specification document should be created, using all the information compiled so far. This document should detail the development requirements for the website and can be used to communicate any specific design constraints.

It's now time to move on from planning to building.

Search engine visibility

Search engine traffic is vital to a website; without it, the chances are that the site will never fulfil its marketing functions. It is essential that the search engines can see the entire publicly visible website, index it fully, and consider its relevance for its chosen keywords.

Search engine optimisation (SEO) has its own chapter in this textbook, but here are the key considerations for web development and design.

Note

Read more about this in the Digital copywriting and Search engine optimisation chapters.

In web development, the copy that is shown on the web page needs to be kept separate from the code that tells the browser how to display the web page. This means that the search engine spider will be able to discern easily what content is to be read and therefore scanned by the spider and what text is an instruction to the browser. Cascading Style Sheets (CSS) can take care of

that.

If the search engine cannot see the text on the page, it means that it cannot crawl and index that page.

Step 2: Design

Design usually happens before development. According to the steps explained earlier in this chapter, the designer will transform the wireframes and basic planning materials into beautifully designed layouts. These are static images that show how the website will look once it's coded.

Step 3: Development

The development phase usually kicks in once the design is finished. Developers will sometimes start their involvement as early as the wireframe stage by creating low-fidelity prototypes to support the user-testing process. Normally, the developer uses the design templates to code the actual website, using the front-end language that you have chosen. Server-side development and CMS considerations may also be part of this phase.

Step 4: Testing and launch

Once you have planned an amazing site, designed it beautifully, built it skilfully and filled it with fantastic copy, it's time to test it fully and then take it live!

Testing is an important part of website development and design, and it should take place throughout the process of planning, designing and building, leaving just final quality assurance (QA) testing before the site goes live. Test subjects should be real potential users of the website, not just members of the development team. The site needs to be tested in all common browsers and devices to make sure that it looks and works as it should across all of them. All links should be tested to make sure that they work correctly, and it's always a good idea to get a final check of all of the copy before it goes live.

Tools such as W3C's HTML validator, validator.w3.org should be used to validate your HTML. See more about testing in Section 6.7 Quality assurance.

Make sure your web analytics tracking tags are in place, after which it will be time to take your site live. Now, you need to move on to driving traffic to your newly launched site, that's where all the Engage tactics in this textbook come in handy.

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6.6: Development methodologies

> **Note**
>
> Read more about this in the Data analytics chapter.

There are different approaches to building a website. The one described above is the waterfall process, where one step follows the other. This is in contrast with other methods such as the agile methodology, which involves faster iteration and greater collaboration, but doesn't afford clients as much control and upfront clarity on the deliverables and timelines.

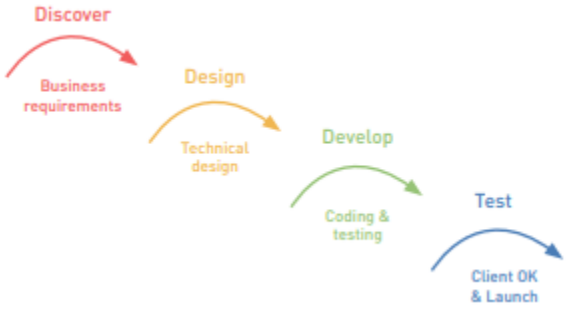


Figure 6.6.1: The waterfall method *Adapted From Adapted Evatotuts+, 2015*

The Agile method is a series of sprints, and involves working through iterative, incremental cycles. Agile methodology is more collaborative, less rigid and requires incremental investments. It often results in being able to release the final product to the market faster. The collaborative approach means that instead of handing over the project to the next person in the chain, you work together catching any issues and working on each iteration as you move through each process. The agile method often involves scrum methodology and requires (or at least tries for) each sprint to produce something that has an increment of product functionality (Joel, 2015).

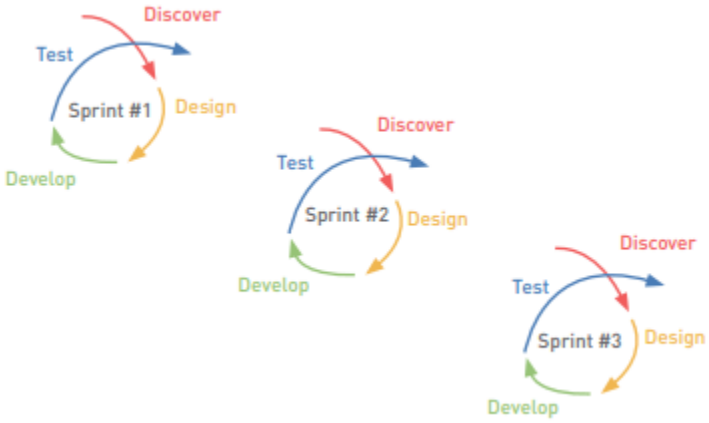


Figure 6.6.2: The Agile method *Adapted From Adapted Evatotuts+, 2015*

> **Note**
>
> Read more about scrum methodology here: www.scrumalliance.org/whyscrum

Careful consideration of the specific project, the goals and ultimately the client's needs will inform the decision on which of these method is appropriate for a specific project. The method chosen should be the one that will best fit the required project goals.

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6.8: Quality assurance

The software development cycle has one final step before the website goes live, quality assurance. This is often referred to as QA. It is a crucial step to ensure that website delivery is of the highest standard and that the client expectation is in line with the agreed Statement of Work. This step is independent of the design and development phases and involves various end-user test cases. Test cases ensure that the graphical user interface (GUI) promotes a great user experience (UX). QA involves two steps: functional and user-interface testing (Thompson, 2015).

Functional testing

This involves testing the features of a website to ensure that they are functioning correctly. Functional testing should be done early in the development cycle as it speeds up development, increases quality and reduces the risk of errors towards the end of the project. Testing can take place either manually by a tester or be completely automated using an application (AppPerfect, 2016).

User interface testing

This is the process of testing whether users can engage with the site as envisioned during development. It also includes testing all features such as screens with controls, like menus, dropdowns, buttons, icons, toolbars, dialogue boxes, forms, and all other user interface features on the site.

User interface testing is crucial as it is the users' experience of the site that will determine if they will use the site or application in future or not. If an interface is not intuitive and is difficult to understand users are unlikely to use that product again. Testing is essential.

The following should be checked during GUI testing:

- Can users input the necessary information into the user fields?
- Does the feature execute the desired function when activated?
- Are error messages displayed correctly and for the correct function?
- Is the font appropriate?
- Is the text aligned?
- Are the colours and fonts, and even error messages, visually appealing?
- Are the images clear and displaying correctly?
- Are the images correctly aligned, and do they appear where they are supposed to?

> **Note**
>
> You can read more about GUI testing at www.guru99.com/guitesting.html.

- Are the GUI elements positioned correctly for different screen sizes and resolutions?

(Guru99, n.d.)

Cross browser and device testing

With the myriad of browsers and devices available, developers need to ensure that their websites render acceptably across all of them. Perfection is extremely difficult as each browser and device renders a website slightly differently. To ensure compatibility, developers write cross-browser code. If a feature is not supported, a fallback must be in place to ensure that it degrades gracefully.

If you are deploying your site across a range of devices, each version needs to be checked. And if the site is designed to be

responsive, check the GUI across a range of devices to test the responsiveness of the design and that all the elements work across the various devices and possible views.

Test websites on different browsers and operating systems, for example Google Chrome on IOS and Google Chrome on Android devices. Various tools are available to assist in this process, one being BrowserStack (/www.browserstack.com). BrowserStack allows you to test various operating systems and devices from within your browser (MDN, 2016).

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6.9: Case study - Offspring

One-line summary

How moving to a responsive design website helped a UK-based online sneaker store called Offspring to increase mobile conversion rate and mobile revenue.

The problem

Offspring (http://www.offspring.co.uk) had no mobile website, and mobile users were having a poor user experience when accessing the site on their devices. This caused poor conversion rates and low revenue for mobile.

Mobile users are the largest growing online market and Offspring witnessed a consistent increase in mobile traffic to their website. Their current site was not mobile-friendly, and was not providing a good user experience. This was also impacting on their SEO score. Offspring knew they needed to ensure mobile users had a good user experience to improve conversions, revenue and SEO.

The solution

Offspring considered a mobile-friendly site, but decided to opt for a fully responsive site to provide an optimised viewing experience irrespective of the device used to access the site. Offspring wanted to ensure that tablet users were also catered for in the design.

The brand also wanted to ensure that they provided existing customers with a familiar look and feel so that they could still easily access and navigate the site.

Certain key design features were included to improve user experience. A new sticky header was included that followed users down the page as they scrolled, providing easy navigation without having to scroll back to the top each time.

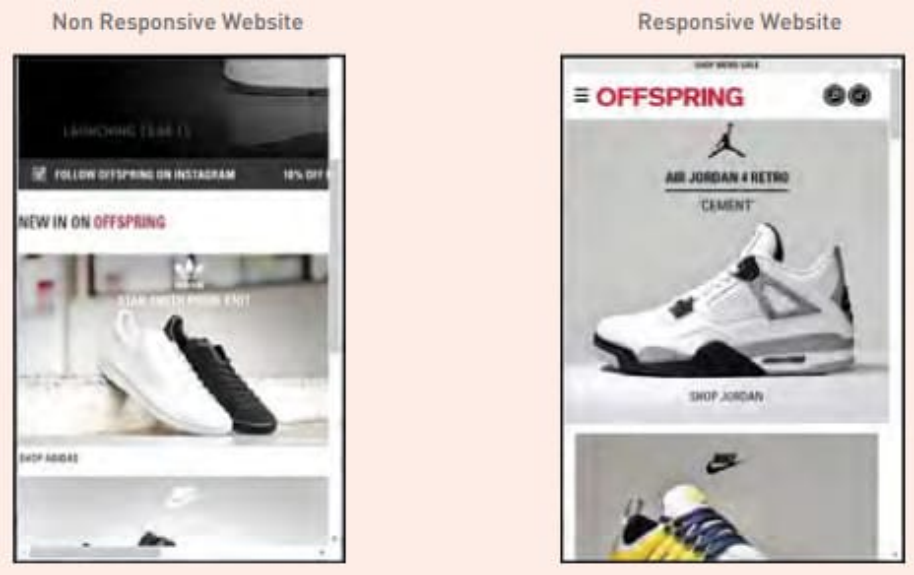


Figure 6.9.1: Offspring's responsive vs. non responsive site *Adapted From imgur, 2016*



Figure 6.9.2: Mobile friendly elements of Offspring's new responsive design *Adapted From imgur, 2016*

A new search bar was included with predictive search. This allowed users to search for their product more quickly.

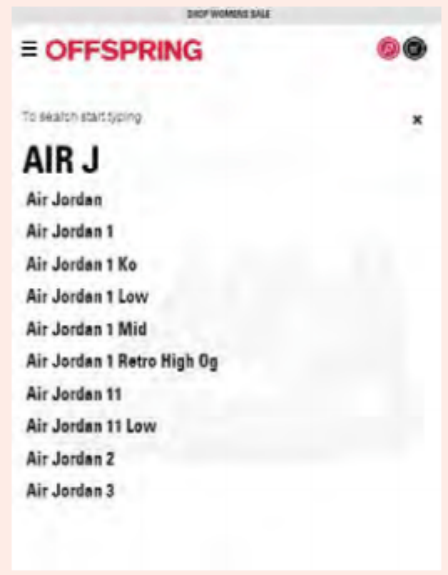


Figure 6.9.3: Search bar with predictive search on new responsive site *Adapted From imgur, 2016*

Other design features included:

- A new product listing page that was three columns wide on a desktop that could automatically scale down to two or one depending on the size of any different device used.
- New image view and selection process was included on the product detail pages.
- A 'Don't forget' section was included on the basket page so that users could automatically add items to their basket.
- An improved checkout process was created with new delivery options.

The intuitive navigation process was crucial to ensuring that users on any device would be able to find the information they needed quickly and easily.

The results

Users spent more time on the site, which lead to an increase in conversions and sales. The SEO visibility of the site showed

dramatic improvement after moving over to the responsive site mainly due to the mobile site usability score on Google rocketing from 60/100 to 100/100. This saw organic traffic to the site increasing by over 25%.



Figure 6.9.4: Offspring's growing SEO visibility score *Adapted From Moz, 2016*

Revenue increased as well, with:

- A 15.19% increase in mobile/tablet conversion rate
- A 102.95% uplift in mobile/tablet revenue year on year
- A 20.25% increase in the e-commerce conversion rate from tablet users alone.

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6.10: The bigger picture

Web development and design can be seen as the thread that holds digital marketing together. After all, websites are the first thing we think of when talking about the Internet.

With the crucial role that search engines play in the way people explore the Internet, web development and design go hand in hand with SEO. And of course, online advertising campaigns, social media channels, email marketing newsletters and even affiliate programs lead people to click through to your website and sometimes to a customised landing page. That's web design jumping into the mix again.

Setting up analytics correctly on your website is also essential to managing and monitoring your marketing success.

Successful website development and design is all about the right preparation, and the resulting website usually forms the foundation of any digital marketing to follow. Make sure you understand your users' needs, and that you're building on a strong base.

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6.E: Web Development and Design(Exercises)

Case study questions

1. When deciding on which type of site to choose, why did Offspring opt for a responsive site?
2. Which two elements of the responsive design were most important in optimising the user experience across a variety of devices?
3. Would you have made the same design decisions? Are there any further considerations you would have designed for?

Chapter questions

1. What are some key design elements you would ensure were included when designing a website?
2. Why is it so important to realistically assess the needs of your site before development?
3. What do you think are the biggest challenges for optimising your design across multiple devices?
4. What, to you, is the most important step in web development?
5. What role does a website play in an overall digital marketing strategy?

Further reading

www.alistapart.com – a website for people who make websites, A List Apart has regular articles from web designers and developers on building user-friendly, standards-compliant websites.

www.html5weekly.com – a weekly newsletter filled with the latest must-know HTML5 tips and trends.

https://www.smashingmagazine.com/ - a website for web designers and developers

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6.S: Web Development and Design(Summary)

Successful websites come from strong planning with a focus on user needs. Websites should be built to be accessible and usable, search engine optimised, and shareable.

Key considerations include:

- Designing your website according to best practices, following the process of developing a website from start to finish.
- Developing a strong, stable and usable website.
- Creating a suitable mobile web experience for your users.
- Enhancing user experience through design and guiding a visitor seamlessly through a website, as opposed to distracting visitors from their goals.
- Ensuring consistency in visual messaging across all properties.
- Supporting a wide range of web browsers and mobile devices.

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7: CREATE - MOBILE CHANNELS AND APPS

Learning Objectives

In this chapter, you will learn:

- The important principles that govern mobile-specific channels.
- To recognise the importance of location in marketing via mobile.
- To identify the mobile channels available to marketers.
- What to consider when creating an app.
- To describe first steps for implementing marketing via certain mobile channels.

7.1: Introduction

7.2: Key terms and concepts

7.3: Core principles

7.4: Defining mobile channels

7.5: Creating an app

7.6: Implementation

7.7: The Internet of Things/The Quantified Self

7.8: Advantages and challenges

7.9: Measuring success

7.10: Tools of the trade

7.11: Case study - ASB digital piggybank

7.12: The bigger picture

7.13: References

7.E: Mobile channels and apps(Exercises)

7.S: Mobile channels and apps(Summary)

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7.1: Introduction

A few years ago, considering mobile as part of your digital marketing strategy was optional, this is no longer the case. In 2015 the number of mobile-only internet users in the US exceeded the number of desktop-only users for the first time (ComScore, 2015). The idea of a mobile device being someone's first, and often only, access point to the Internet is nothing new in developing nations where desktop devices and fixed internet connections are too expensive for much of the population.

This means that mobile is not a marketing strategy that can be considered separately. It's a necessary part of every digital marketing endeavour because chances are good that at least some of your audience will see that marketing on a mobile device.

In this chapter we will discuss some mobile-specific channels and apps. Remember, digital marketing is about looking at where your audience is and working to reach them, and your audience is almost certainly on mobile.

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7.2: Key terms and concepts

Table 7.2.1

Term	Definition
App	Short for ‘application’, which in a mobile context, means software developed specifically for smartphones and other mobile devices. These come in two types, web apps and native apps.
Augmented reality (AR)	A form of virtual reality in which computer graphics are superimposed onto the physical space around the user by way of a mobile device. These graphics can be 3D images or information tags.
Bluetooth	A short-distance wireless transfer protocol for connecting devices.
LTE	‘Long term evolution’. A fourth-generation mobile communications standard and a name given to technology used in pursuit of faster data communication.
NFC	‘Near-field communication’. A set of communication protocols that enable two devices, one of which is usually a mobile device, to communicate when they are within 4 cm of each other.
Push messaging	A notification from an app that displays on a smartphone while the app is not actively in use. This is triggered by an external event within the context of a connected device.
QR code	Quick response code. A machine-readable code, like a barcode, that can be used to store information like URLs and can be read by an app through the camera of a smartphone.
SMS	Short message service, a text message of up to 160 characters that can be sent from one mobile phone to another. MMS, Multimedia Messaging Service, is similar, but can include multimedia content and longer messages. This works on a regular cell phone connection, so it does not require a data connection or smartphone.
Virtual reality (VR)	Computer-generated simulations of a 3D image or environment. Using the right equipment, a person can interact with that environment in a seemingly real way
Wi-Fi	The transfer of information from one device to another over a distance without using wires.

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7.3: Core principles

Nine principles

Certain features are specific to certain mobile phones, and don't apply to desktop or notebook computers or any other mobile devices. These features highlight the importance of mobile to marketers as a whole and affect the way both consumers and marketers create and share content.

Personal

Mobile phones are very personal devices. People don't usually share their phones, so data attributed to a specific device can be attributed to a specific user. People also tend to keep their devices nearby, so they can offer valuable information about their location and great opportunities for location-based target marketing.

The implication for marketers: Since mobile phones are so personal, respect for privacy and permission is extremely important. Attributing data to a single user allows marketers to offer personalised interactions, communications, and experiences.

Always carried

Everyone is reluctant to leave their phone behind. Consider your own behaviour, what do you take with you when you leave your house? Your wallet, keys, and mobile phone? Various research has shown that smartphone owners in particular check their phone anywhere from every few minutes to at least once an hour and that people can spend up to 2.5 hours typing texts, swiping through apps or scrolling through Facebook (Gallup, 2015; Dscout, 2016).

The implication for marketers: The mobile device is present at every single step of the consumer journey, arguably the only channel that is. Messages sent to mobile phones are usually accessed within minutes of being received. Location services can also allow you to send contextual messages depending on the user's real-time location.

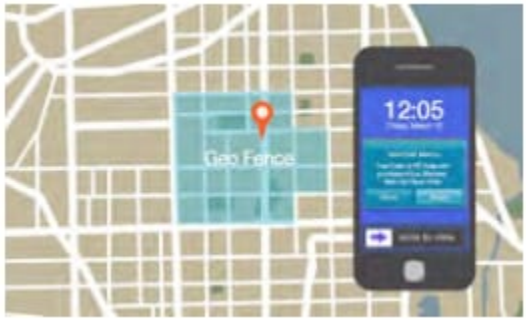


Figure 7.3.1: An example of a marketing message tied to a geographic location. Users receive promotions when they enter the area *Adapted From STM Custom studios, n.d.*

Always on

The mobile phone is used to send and receive messages and phone calls. Messages and services can be sent and responded to at all times of the day.

The implication for marketers: This feature changes the services and messages that you can develop. Marketers need to be sensitive with their marketing communications; few people would enjoy a 4 a.m. SMS with a promotional offer. The flip side of this is that you can send time-sensitive offers, such as dinner messages just before work ends or a weekend coupon on a Friday afternoon.

Built-in payment system

This is one of the key features of the mobile phone, and a major source of mobile revenue. Every mobile phone has a built-in payment mechanism, the SIM card. Billing is easily handled through the user's mobile network. NFC and QR codes allow other payment options.

A number of services, like Android Pay, Google Wallet, Snapscan or Zapper can turn the mobile into a virtual wallet or bank card, bringing banking and payment services to people globally. Apps like Uber have their own built-in payment services to make payment for users as easy as possible.

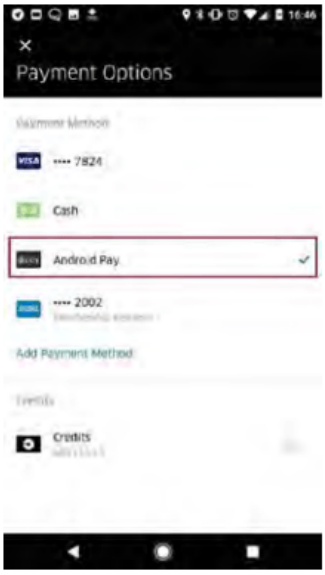


Figure 7.3.2: Uber offers its customers a variety of payment options through their mobile phone, including credit card, Android Pay, cash and even Uber credits. *Adapted From Uber, 2017*

The implication for marketers: Consumers will pay for services and content on their mobile, which is enabled to make payments. This means that advertising is not the only way to generate revenue on mobile.

Available at the point of creative inspiration

Because the mobile phone is always close at hand, and many phones today offer tools such as cameras, videos, or note pads for jotting down ideas, it has become a permanent creative tool. It also makes access to social media very easy.

The implication for marketers: Users can be encouraged to interact with brands through campaigns created for mobile devices. Mobile is a useful tool in viral campaigns based on consumer-generated content. Because the amount of effort required to criticise or praise a brand on social is minimal, the social aspect of a mobile can be helpful or harmful or can be used to encourage social engagement or consumer feedback.

Accurate audience measurement

Every transaction made on a mobile phone can be uniquely tracked to that mobile phone number including voice calls, SMS, or Internet access. Mobile phones also allow for real-time tracking allowing you to edit campaigns as they are run. Google's Universal Analytics also allows you to track user experience across devices.



Figure 7.3.3: Universal Analytics can now track individual users across devices and touchpoints *Adapted From Treefish, n.d.*

The implication for marketers: The extra data gathered by mobile phones offers marketers profiling and segmenting opportunities for targeting the right audience. Because mobile phones are personal, measurement is improved overall. Campaigns can also be accurately measured and tracked for their return on investment (ROI) and the mobile phone offers many more ways to collect data, including location, web analytics, SMS response rates and Bluetooth.

Even with mobiles that are on a prepaid or pay-as-you-go contract, meaning that network operators do not have a name or demographic details to accompany the mobile number, you can still track and measure every transaction made by the user of a particular phone. This information is limited by networks, which determine the data they are willing to share with marketing companies.

Social context

Mobile can capture 'the social context of our consumption', which means capturing who we are sharing with. If you are using a product like an eBook, for instance, your mobile phone holds information on who you talked to while reading it, whom you shared it with, and whether you recommended it to a connection who then purchased the item (Ahonen, 2008).

The implication for marketers: Marketers can get insight from the way that mobile users share their products and socialise while using them and use this information to increase sales.

Augmented reality

The mobile phone makes it possible to add a layer of information to the real world through augmented reality (AR). For example, Layar, an augmented reality mobile browser, allows users to see embedded digital content in a number of sources such as posters, magazines, advertisements, or QR codes. This can lead to extra content such as movie trailers, discount codes and videos (Layar, 2016).

The implication for marketers: Cost and accessibility for this technology can sometimes be a concern, but adding a layer of interaction to the real world can be a powerful tool in a marketing campaign.

Digital interface

Various mobile technologies can enrich a user's life by adding a digital layer to a real-world experience as with augmented reality. A mobile phone can also be used to control things in the real world, like switching on a light or opening a door.

The implication for marketers: Marketers can create memorable and emotive experiences that users will want to share and therefore broaden marketers' reach. It also broadens the potential user interface options for a brand or product.

Location and mobile

Two of the most important contributions of mobile to the marketing world are location and convenience. If services and useful information can be shared based on a user's location, the possibility for conversions naturally increase. The more contextually

relevant your marketing message is to the user, the more likely they are to engage.

Research by Social Media Today showed that 88% of consumers who search for a local business on a mobile device call or visit that business within 24 hours, and seven out of 10 interact with their device while shopping in-store (Impact, 2016). Businesses should absolutely take advantage of the location-specific possibilities of mobile, making themselves easily findable online and ensuring a good mobile experience on their site.

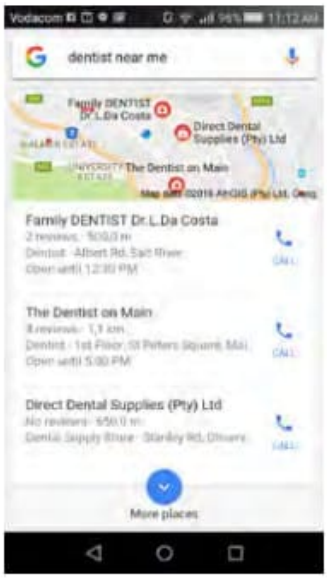


Figure 7.3.4: Location-specific results for a local search – note the distance indicator *Adapted From Screenshot, Google locator*

Geolocation

Providing customers with what they really need becomes easier when combining marketing techniques with geolocation. For example, someone searching for a local business would find it very useful to see the closest one along with a map to its location. Google is well aware of this and will give users location-specific results, so it's essential for a local business to list itself on Google Business.

Local news results can also offer a better user experience for people conducting news searches, and combining QR codes or short codes with print advertising is one way to provide consumers with geo-relevant information. A QR code on a poster could offer a discount voucher to someone coming to the local retail outlet, for example.

A business can also find new options to reach users by providing free wireless to users visiting its location, as Starbucks does.

> To reach customers in areas of the world where data is scarce and more expensive, some online services turn to a 'zero rating' system, which means that users don't pay for data when accessing that particular service. While this is somewhat controversial, examples include Facebook Zero, and a carrier in the United States announced in 2016 that YouTube would be zero rated for its users, so video content for YouTube would not be counted against data caps (Brookings, 2016).
>
> Some apps have stripped down user interfaces to use less data and work better with poor data connections and low-end phones. Examples here are Facebook Lite and YouTube Lite. These apps demonstrate an important lesson, that marketers need to tailor the mobile experience to their audience.

Mobile search combined with location awareness offers a targeted user experience. If a website can detect what device someone is using and where they are (which they can), they can deliver content customised to user location, either automatically or after user input.

Mobile social networks

Several social networks, like Instagram and Snapchat, have been created specifically for mobile phones, and the others focus

heavily on a mobile-friendly user experience, since most people access social networks via mobile. For example, more than half of Facebook's monthly active users access it only on mobile (VentureBeat, 2016).

Many social networks also encourage geotagging when users make or comment on posts so if you upload a photo to Facebook it will ask if you want to add a location. Networks like Foursquare encourage check ins at various locations by offering incentives like discounts or vouchers.

Consider the potential of social search as well. Product or brand searches based on social networks and location can be a powerful tool. Personal referrals are now combined with location-specific information.

Note

Learn more about this in the Search engine optimisation chapter.

There is a strong strategic incentive to provide free Wi-Fi to customers at physical outlets like Starbucks mentioned above, as this not only provides a great selling point but also gives the marketer a channel to communicate with and gain information from customers. It lets you track their mobile behaviour and location (with permission, of course), send coupons and offers, engage in CRM-related questionnaires and provide helpful information and support.

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7.4: Defining mobile channels

While mobile is increasingly and inextricably interwoven with all aspects of marketing and as such shouldn't be considered in isolation, there are some methods of communication that are only accessible via a mobile device.

> Note
>
> Read more about these in the Direct marketing - email and mobile chapter.

SMS/MMS

SMS (short message service) and MMS (multimedia messaging service) are standard text messages sent via mobile phone over a cellular network. An MMS can also include various types of media such as images, audio, or a short video.

These are push methods for messaging, where the brand sends out the message to the customer. They also offer the opportunity to receive messages from consumers, for example, as feedback or in a competition. Google has released a click-tomessage ad extension that allows users to directly SMS a company from the search engine results pages, without having to look for a number on a web page.



Figure 7.4.1: An example of a click to text ad from Google *Adapted From Venture beat, 2017*

> Note
>
> Read more about ad extensions in the Search advertising chapter

Despite the ever-increasing popularity of smartphones and the associated instant messaging programs, SMS and MMS can still have their place in a good marketing strategy, particularly for relaying information, reminders, and automated confirmation.

USSD

USSD is a pull method of reaching your customer in that they need to come to you. The caller dials a number, usually starting with a * and ending with a #, and is sent a menu with various options. They can then enter the number that corresponds to their request.

USSD is a good way of collecting data from your user. Some brands use it to capture competition entries and survey answers. It can also be used for mobile commerce like when you buy more data for your phone by using airtime and can be used with

location-based technology.

Bluetooth beacons

A beacon is a small low-energy Bluetooth device. It can transmit small packets of information across short distances. If a smartphone with the brand's app installed comes into range, it can receive a notification of a discount, reward, suggestion, or anything else you want to send. This is still permission marketing, as the app has to be installed for it to work.

Also known as proximity marketing, this takes location-specific marketing from a general area to an exact location inside a store. It can be used to send targeted discount coupons, demonstration videos for products or directions to a nearby product.

AR/VR

Augmented reality superimposes computer graphics into the physical space around the person using an AR device (usually a smartphone or tablet). Virtual reality takes this a step further using products like Google Cardboard and 360-degree videos in an attempt to create an even more immersive interaction.



Figure 7.4.2: Google Cardboard *Adapted From Wikimedia, n.d.*

AR can use image recognition to turn images without markers, without a barcode, QR code, or other visible stamp, into triggers that launch an AR or VR experience. It can launch a link, open an app, dial a number and give directions. This can also be location-based, so a user in a store could start an app and see more information about the products in front of them.

AR and VR are not about direct marketing, but engagement, creating an exciting experience for their consumers that makes them want to engage with the brand.

> **Note**
>
> Check out some good uses of augmented reality here: https:// www.lifewire. com/applicationsof-augmentedreality-2495561

Apps

An app is a software program designed to run on a mobile device like a smartphone or tablet. 'App' can also refer to a web app or online app, which is software that you use while online via a browser. Most apps perform a very specific, narrow purpose, though some do not. The best apps take user needs into account, become a strong touchpoint for the brand, enable the sales of products, and importantly solve user problems. They can extend the reach of your business and, assuming you understand the needs of your audience and create an app that meets those needs, can also help build a relationship with your customers.

Apps vs. websites

Should your brand even have an app or can it afford to live without one? Every company seems to be releasing its own app these days, which is understandable, given that consumers spend 90% of their time on mobile in apps rather than a browser. These include social media apps, entertainment apps, games and news (Smart Insights, 2016).

Until about 2015, mobile browsers weren't very good and even as they improved, websites became more bloated, hindering performance. Apps enable people to do something or access something quickly and easily on mobile. This means that many apps are essentially browsers designed for a specific purpose. SurveyMonkey lists the top five most popular apps in the USA for January to June of 2016 as:

- Facebook
- YouTube
- Messenger
- Google Maps
- Play Store.

The popularity of these apps demonstrates user interest in social networks, entertaining content and practical utility.

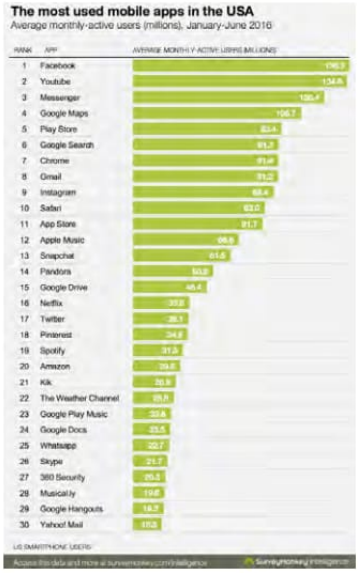


Figure 7.4.3: The most-used mobile apps in the USA *Adapted From Techcrunch, 2016*

Despite arguably being glorified browsers, the advantages of apps are numerous.

- The easy access button on a home screen.
- Integration with the device's operating system and the speed that comes with that and being locally installed.
- Access to native functions.

However, if your website isn't already getting traffic, an app will not solve that problem.

In the USA, the number of app downloads is decreasing. Globally, because the mobile phone market is still increasing, app downloads are increasing too but, with a few exceptions, not by very much. Of course, once the apps are downloaded, they are of no use unless the smartphone user actually uses them. A survey from the Pew Research Center found that 46% of respondents use six to ten apps per week, and 35% use six to 10; AppsFlyer found that most apps aren't even kept for a full day, with only 3.3% of Android apps and 3.2% of iOS apps still boasting active users after 30 days (eMarketer, 2015).

With more than 2.5 million available apps and users averaging 17–20 apps per device, the app market is saturated, which means that to stand out, you need to offer users something they really want.

Does this mean that you shouldn't bother with an app, should you just stick to a website and make sure that it offers the user an excellent browsing experience? Not necessarily. If you do decide to make an app, make sure there is a need for it, for instance:

- If the user needs to do something location-specific.
- If you need to do push messaging (see below).
- If you need to do something graphics-heavy that can't be done with videos on YouTube or Facebook.
- If your service requires the storing of sensitive user information like credit card information on the users' phone.

Look at your connected consumer and ask how an app will make a large, continuous improvement to the service you offer. Creating an app simply for its own sake will lose you time and money.

One example of a brand having great success with its app is Starbucks. The app does very well because:

- It is location-specific: The app makes finding the nearest Starbucks very easy. It also uses GPS to determine which store a user is at and then shares music information for that location. Users can then save songs they hear in the store to a playlist within the app and access and keep listening to the music after they leave.
- It uses gamification: The loyalty programme is tiered, with extra freebies and benefits for people higher up.
- It uses functions that are specific to the mobile phone, like GPS.
- It allows people to order and pay in advance by mobile before picking up the drink.
- It engages customers using special incentives and bonuses to encourage continued app use.
- It encourages a social aspect, the rewards offered by the loyalty programme make customers feel exclusive, and they are then more likely to share updates on social media.
- It makes access to user data very easy. It also uses in-app messages to encourage users to fill out surveys in exchange for more stars for the loyalty programme.
- It offers a lot of opportunity for branding.
- It plans to expand the app to make personalised recommendations, which will increase in-app purchases.

(Digital Turbine, 2016).

Starbucks has used its app to expand on its existing offering and to differentiate its loyalty programme from those of similar brands by catering to the needs of its mobile audience.

Push notifications

Push notifications let your app send messages to the user even when your app is not active. The app's icon and a message appear in the status bar, for example when you receive a message on Facebook or WhatsApp or when Memrise sends you a daily reminder to study.

Push notifications, like anything else on mobile, rely on permission marketing; people have to opt in to receive these notifications. The notifications do need to be optimised to ensure that the user pays attention (the majority of users are annoyed by them).



Figure 7.4.4: How people really feel about push notifications *Adapted From Localytics, 2016*

People want personalised push messages that are relevant to their needs, arrive at the right time, and don't come too often.

Other

Other mobile-specific channels exist, such as QR codes and near-field communications (NFC). For the most part, these will fall into other areas of digital marketing. NFC can be used for payment or ticketing, QR codes for launching AR experiences or for payment, so we will not go into detail on those here.

Wearables such as smartwatches and fitness monitors are a rapidly expanding market, though apart from gathering data, marketers are still struggling to determine their impact on our behaviour, expectations, and marketing strategies.

Their biggest strength is their ability to reduce the time between a user developing intent and taking action. On the other hand, people don't check their phones as often if they have a wearable to alert them when something happens, which will reduce the number of impressions your marketing messages receive.

For now, the best advice we can give for approaching wearables is to consider what kind of information people want and need to see and how you can use that to encourage engagement. Wearables are something that marketers need to experiment with.

> Take a look at Emirates NBD bank's use of wearables synched to mobile devices to promote its savings accounts by giving better interest rates to customers who kept fit: www.digitaltrainingacademy.co...udies/2016/10/gamification_case_study_emirates_bank_rewards_exercise_with_better_ savings_via_fitness_app.php

> It's important to remember that mobile is a layer on top of all of your other marketing activities. As a marketer, you should never start by deciding what mobile channel you're going to use and then plan a campaign. Instead, find out where your audience is and what kind of devices they use to access the Internet, and use that to inform what kind of channels and campaign you will plan. For example, if they are more likely to access your campaign at work, desktop channels might be the best way to go.

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7.5: Creating an app

Do you REALLY need one?

We've already looked at why you might not want to use an app and what kind of value you need to be able to offer your consumer. Before you decide to make one, ignore all the people telling you that an app is a basic necessity. Think about the following:

- Can you define in one sentence what you want your app to accomplish?
- What problem does your app solve? How can your app make things better for your user?
- What can you give your consumer that they can't get from another app?
- Does your target market download and use apps? Will they use your app?
- Do you have enough engaging content to keep them coming back?

> **Note**
>
> Read more about responsive websites in the Web development and design chapter.

- Will it help you sell a lot more products/services?
- How much are you willing to invest? Remember, apps are expensive. Could you get by with just a responsive website?

Planning

Once you've decided that you really do need an app, it's time to get into the process of planning it.

Choosing a platform

Before you even choose an app developer, you need to know what operating system you'll be developing for. Developing for multiple operating systems (OS) at a time can get expensive; so many companies start with one and then expand if the app is a success. Generally, this involves doing market research to find out what kind of OS your users are most likely to use. The most common, of course, are Android and iOS.

This research is important, if you build your app for the wrong OS, you're failing before you even start. For example, the iPhone is very common in developed markets like the USA, but Android is far more popular in developing markets and is in fact gaining market share from Apple.

These days, Android has the largest market share, but there is an argument to be made for developing for iOS first. Take a look at these pros and cons (Savvy Apps Blog, 2016).

Table 7.5.1

	Android	iOS
Audience demographics	Large platform share, common in developing nations and areas with lower income	Tend to have a higher income and spend more per app. Can show more engagement
Revenue	More ad-supported apps	More paid-for apps
OS version U	Users don't adopt new OS releases quickly	Users adopt new versions quickly
Features	Similar to iOS, but can involve more features	Similar, but fewer features

Start by finding out which platform your target users are most likely to be on. After that, consider the other elements.

User stories

Before you hire an app developer, you should have a one-sentence description of what you want your app to accomplish. From that, you will consider what kind of features your app will include. However, that alone is not enough to let your developers know what you want the end product to look like. The solution: User stories. A user story is a brief, simple description of one of the features of your app. This should be told by the point of view of your user, the person who wants to use that feature. They look like this:

As a [user type/customer persona], I want to [goal/objective – what they want to do] so that [reason/benefit/value].

This will cover who you are building the feature for, what the feature is, and why you're building it. For example:

As a food lover, I want to pull up restaurant reviews so that I can choose the best place to eat.

As a hungry person, I want to find directions to the nearest restaurant so that I can eat right now.

> Note
>
> For mobile, you may also want to consider where and when your users are using the app. Your user story would then include a where/ when element.

As someone who loves cooking, I want to find recipes for my favourite restaurant food so I can make it myself at home.

Write as many user stories for your app as you can and give them to your app developer. This will help them create exactly the app you want.

Timing

Developing an app can take at least three tosix months, depending on the complexities involved. The back end tends to take longer than the front end to develop (see below). Timing can be impacted by, among other things:

- budget
- intention (is this a long-term or a small campaign-specific app?)
- number of features
- size of the team.

Android apps can take longer to develop than iOS apps. Make sure you keep this in mind when you decide on a desired completion date for your app.

Front-and back-end

Think about the UX process and what the app (front-end) will look like before development starts. After you have working prototypes, you can think about what kind of information you need from your users (back-end).

Front-end development involves:

- Mock ups and wireframing
- Prototyping
- Designing and developing the user interface
- Remote data access
- Data caching (storing data locally)
- App data synchronisation so that the app can be accessed offline
- Testing
- Deployment.



Figure 7.5.1: A low fidelity wireframe for an iPhone App for Harvest *Adapted From Design Reviver, 2010*



Figure 7.5.2: The actual Harvest App *Adapted From Anthony Armendariz, n.d.*

Back-end development involves:

- Secure data access over network.
- Database management (including user data and other types of data), user accounts and authentication.
- Scaling your database to handle increasing numbers of users and avoid crashing from overload.
- Customising the user experience and how the user goes through the application (relevant to UX design).
- Data integration, how users share information to third-party websites.
- Sending data to front-end devices (push notifications).

Front- and back-end developers need to collaborate because they need to interface with the servers to send and receive data to and from the servers, which happens when they begin implementing the app's functionality.

Testing

App creation should be an iterative process. As the app is being developed, each element should be evaluated and improved as far as possible meaning you prototype something, test it, get feedback, and send it back to the developers to implement improvements. Even after the app is released, the process continues as feedback from users comes in. Remember, your app is a product or at the very least a consumer touchpoint that needs to be managed.

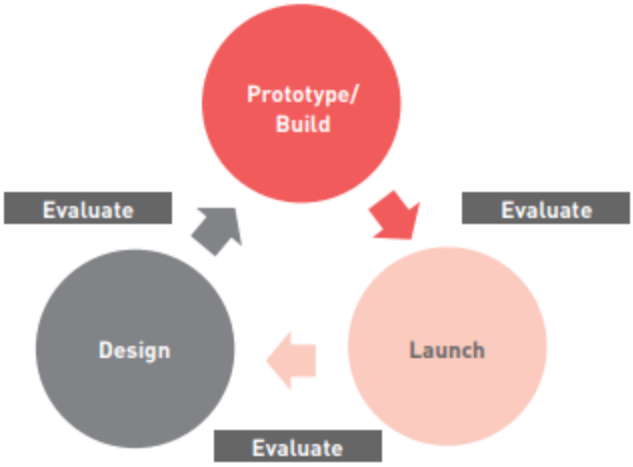


Figure 7.5.3: The iterative app development process

Before launch, you will need to run usability tests, quality assurance testing, and beta testing when a sample of your intended audience tries out the app.

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7.6: Implementation

Before implementing any kind of marketing via mobile, you need the permission of your customers via an opt-in mechanism. This means that they either need to sign up or grant an app permission to show them marketing materials. Always be honest about what kind of messages users can expect, and don't try to hide an opt-in acknowledgement, for example deep in the terms and conditions of a competition.

For something like SMS/MMS, you will need to build up a database of phone numbers from willing customers. For push messaging, your app will need to ask permission to send push notifications to users' home screens. For AR and VR, the users need to download an app and deliberately scan an image, code, or other trigger to launch the experience, so you don't need to actively ask permission for this.

SMS/MMS

For an SMS marketing campaign, you need to use shortcodes and keywords. A shortcode is a simple, short number to which a customer can send an SMS and opt in to the campaign. The keyword is the word they place in the SMS itself.

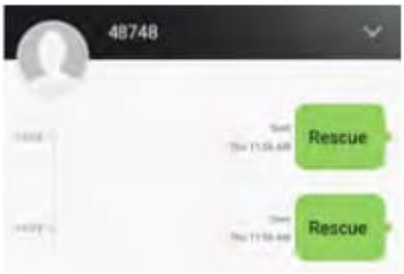


Figure 7.6.1: A shortcode and keyword to send a donation to an animal rescue organisation *Adapted From Screenshot, SMS code*

They can also opt in online or by checking a box on an order form, among other methods. Once the customer has opted in, you can send them an automated response or add them to your database to receive more texts over time. These can include, among others:

- Coupons
- Very short surveys/votes
- Contests/competitions
- Photos/videos via MMS (such as a flyer or menu).

> You don't need special permission to contact a customer about a transaction you have already agreed on, for example, as a notification that a product is on its way.

Push messaging

Push notifications need to involve a lot of security so that no one else can send these notifications to your users. You will need to register your app for push notifications and obtain the user's permission before you can start. If you are interested in the more technical side of this, beyond just asking your app developer to do it, you can read about it in this Push Notifications Tutorial: www.raywenderlich. com/123862/push-notifications-tutorial.

AR/VR

For AR, the user needs to download an app, and then scan an image, code, or other trigger to view the experience you have created. These extra steps can make people reluctant to engage with your campaign, so you need to make sure that the instructions are clear and the procedure is both easy and worthwhile. Make sure there's something in it for the user, whether that's

real entertainment or something more tangible.



Figure 7.6.2: Be sure to include instructions for downloading and using AR apps and ensure the app is worth the effort for the user. *Adapted From Playme, n.d.*

Apps

A branded app is not complete once all the programming is done and you can view the final product on your phone. There are still a few steps to be followed before people will start downloading the app.

The App/Play Store

First, you need to optimise your app's page on the App Store or the Google Play store. Search is responsible for most organic downloads, so you want to make sure people can find your app. This involves some SEO tactics. For Google Play:

- Put your main keyword in the app title.
- Use the keyword repeatedly in the app description.
- Make sure your design and screenshots are eye-catching and engaging.
- Include a demo video.
- Do what you can to ensure good reviews.
- Try to make sure your app will be used often.

For the App Store:

- Again, use your main keyword in the title, the keyword that is searched most often.
- Track your keywords and update them.

> **Note**
>
> Read more about keywords in the SEO chapter.

- Good ratings and reviews are important.
- A high number of downloads will move you up the rankings in the App Store

Discoverability

Next, you want to make people aware that your app exists otherwise they won't know what to search for. You can do this using:

- Your other digital marketing channels

    - Email
    - Your website
    - our social media pages
    - Online advertising
- Print ads
- In-store signs
- Your existing customers (they can share the app)
- Event-based promotions
- Search optimisation (discussed above).

Once they're aware of your app, you still need to convince them to download it.

Acquisition

How can you convince people to download your app once they realise it exists? You have a few options.

- One of Facebook's ad options is specifically aimed at convincing people to download your app. You'll want to make sure that you understand your audience well so that you can customise campaigns to different segments of your target audience. Remember to follow social media advertising best practice.
- Referral rewards work well for certain apps. For example, Uber offers discounts to both the referrer and the referee if the app is downloaded. Word of mouth is always a powerful tool.
- Find influencers in your industry, or popular bloggers, and ask them to preview your app. You can also submit the app to app review sites.
- If your app is location-specific, make sure you advertise in the relevant locations.

Of course, there are other ways to market your app; these are just a few to get you started. Now that your users have downloaded it, the onus is on your app to prove that it's actually worth using.

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7.7: The Internet of Things/The Quantified Self

The Internet of Things (IoT) stems from the idea that any device can be connected to the Internet or to another device. The IoT itself is a massive network of connected 'things', people, coffee makers, cars, front doors, and almost anything else that can be given a connection to the Internet. Think about the concept of a 'smart house' that can read your calendar, see your meetings for the day, set an appropriate time for your alarm to go off, have coffee ready and waiting and send the fastest route to work straight to your car. According to some estimates, there were 10 billion connected devices in 2015, expected to increase to 75 billion by 2020. (The Marketing Journal, 2016)

> For some interesting takes on the security problems surrounding the Internet of Things, check out Bruce Schneier's blog: https://www.schneier.com/blog/archives/2017/02/security_and_pr.html.

The quantified self is related to this, it's all about using technology to measure every aspect of our lives. Fitness wearables like Fitbits are worn every day and can track elements such as your steps, sleeping patterns and eating habits.

The biggest impact on marketing for the quantified self is data, the sheer amount of it being created every day gives marketers incredible opportunities to mine that data for insights to help target their marketing opportunities.

Increased data access is also inevitable with the IoT online devices can be connected to social data. The marketer will have to be something of a data scientist, using this new data to gain insight into the customer journey, but it goes a little further, the IoT means that brands can connect to customers and encourage interactivity much more easily by sending the right message to the right device and at the right time.

The amount of data available because of IoT allows real-time interaction and targeted, contextual ads.

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7.8: Advantages and challenges

The benefits of mobile are numerous.

- Most mobile marketing mediums don't require you to educate the audience.
- Mobile is location-specific, offering opportunities to localise marketing and sharpen targeting efforts.
- Mobiles are very immediate devices, with messages delivered instantly and very often acted on quickly.
- Campaigns delivered via mobile can be very cost-effective.
- Mobiles give you the opportunity to reach a target audience that may not have access to desktop computers.
- Mobiles are ideal devices for well-optimised content delivery.

Of course, it also comes with its own unique challenges.

- Privacy is paramount because the mobile phone is personal, so campaigns need to ask users' permission and assure them of privacy.
- Mobiles vary widely in screen size, operating systems and browsers, so standardising websites and campaigns can be a challenge.
- The small screen size associated with mobile limits options for browsing and inputting information.
- Ensuring that brands provide value to users over mobile can take some careful thought.
- Smartphone penetration is far from 100% in developing areas, and data costs can impact user access as well.

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7.9: Measuring success

Mobile analytics are important for improving cross-channel marketing campaigns as well as optimising your mobile channels. Analytics for how your website and ads perform on mobile devices can be found in Google Analytics. SMS reporting can show you open rates, which messages were successful, and who received your message, among other things. Your mobile metrics should be measured across websites, apps, and any other aspect of mobile campaigns to help you measure ROI. Important metrics to measure include:

- Mobile device type
- Operating system
- Screen size
- How mobile visitors came to your site/app
- On-site engagement metrics like number of page views, time on site, and bounce rates.

With apps in particular, it's easy to focus on the wrong metrics as important. Most people's instinct is to look at number of downloads and installations, but that's not enough to show success. Many users download an app, open it once, and never look at it again.

Important app metrics, then, can include:

- Number of active users
- Lifetime value/revenue per user
- Retention rate
- Session length
- Exit screen (to see if one screen is causing people to leave your app in frustration)
- Number of user sessions per day (users who engage more with an app are more likely to become loyal users)
- Crash analytics (tracking your app's crashes per user to identify technical barriers).

Always remember that you need to focus on metrics that show whether the user is using and enjoying your mobile properties.

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7.10: Tools of the trade

POP app is an app prototyping application that helps you create a working prototype quickly and easily: https://marvelapp.com/pop

Flurry (recently acquired by Yahoo) is an app analytics platform that can also give you metrics on ad performance and detailed user acquisition reports: developer. yahoo.com/analytics/

Vuforia is an augmented reality app creation tool: www.vuforia.com/

TestFairy is an app testing tool for android and iOS: http://testfairy.com/

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7.11: Case study - ASB digital piggybank

One-line summary

ASB, a leading Australian bank, developed a digital piggybank to help children save and learn about money in a world where money is increasingly digital rather than tangible.

The challenge

ASB wanted to build a base of future customers and simultaneously help children save money. They found that because money is increasingly abstract in a cashless society, it can be difficult to teach children the value of money, which can make it harder to encourage them to save.

The solution

ASB, with Saatchi and Saatchi, created Clever Kash, a toy elephant with a digital screen that connects to an app via a secure, encrypted Bluetooth connection. It can be recharged every two weeks or so using a micro USB.

The device connects to an app and allows parents to swipe virtual money from the app into the Clever Kash elephant, which is actually the child's savings account at ASB. It makes use of gamification with sounds being triggered and badges awarded when a child sends money to the piggybank, reaches a milestone, or completes a savings goal.

The invention also keeps privacy and security in mind as the connection between app and elephant is encrypted, communication is one-way from the app to the piggybank, and data sent from the app is controlled by the parent. The child has no transactional ability, and the piggybank stores no account information.

The results

The campaign won a Cannes Lion Gold award in 2016, and by this time 38 000 people had signed up for the app. More than this, the brand gave customers something they valued and helped build strong relationships starting with the children who were using the piggybanks. It was also the beginning of the bank moving into an innovative tech space, thus expanding its options for the future.

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7.12: The bigger picture

Mobile communications should always be considered in context with your other marketing communications. Rather than being a separate channel, mobile is a way to access and integrate with many other forms of communication. It is inextricably intertwined with every aspect of digital and must be considered in that way.

One of mobile's powerful characteristics is its ability to stitch media together, especially as a way to bridge online and offline marketing activities, because it is located in the real-world space and can simultaneously access the digital world. Apps such as those that scan triggers to access media can play a major role in this stitching, as can other mobile-focused channels such as Bluetooth.

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7.E: Mobile channels and apps(Exercises)

Case study questions

1. Describe how this campaign combined real-world experience with digital options.
2. Why was an app the right way to go for this brand?
3. Would you have included any other digital or mobile-specific channels in this campaign? Which ones/why?

Chapter questions

1. What makes mobile such a powerful medium for marketing?
2. What are the biggest concerns for mobile-focused marketing?
3. When is it a good idea to create an app for your brand?
4. How would you go about deciding which engagement method is the best to use for your target market?

Further reading

www.mmaglobal.com - The Mobile Marketing Association contains research and insights, case studies, and educational material for mobile.

www.mobilemarketer.com – Mobile Marketer covers different forms of mobile marketing, offering news and developments in the industry.

mobilemarketingwatch.com – Mobile Marketing Watch is a blog covering all things related to mobile marketing and advertising.

www.apptamin.com/blog - The Apptamin blog focuses specifically on apps and app marketing.

savvyapps.com/blog – A great, informative resource focusing on app development.

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7.S: Mobile channels and apps(Summary)

Mobile has several factors which make it ideal for communicating with your customers at their moment of need, provided you respect the need for privacy and permission. It also allows for hyper-local and interactive marketing, which can greatly increase engagement.

People spend more time online than with any other media. Much of that time on mobile, and most time on mobile is spent in apps, which makes apps a dominant form of digital interaction (Convince & Convert n.d.). Consider carefully whether your business really needs an app.

If you do decide to run a mobile-focused campaign or create an app, you need to make sure that you implement it carefully and, as always, measure and optimise as you go along.

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8: CREATE - SEARCH ENGINE OPTIMIZATION (SEO)

Learning Objectives

In this chapter, you will learn:

- How search engines work and how they deliver results.
- How to plan, research and implement an effective keyword strategy across text and other content.
- Techniques for link building, an essential aspect of SEO.
- How specialised search, such as mobile, social and local search, can affect your rankings and how to optimise for these.

8.1: References

8.2: Introduction

8.3: Key terms and concepts

8.4: Core principles

8.5: Implementation

8.6: What not to do

8.7: Advantages and challenges

8.8: Tools of the trade

8.9: Case study - Lloyds Pharmacy Online Doctor

8.10: The bigger picture

8.E: Search engine optimisation (SEO)(Exercises)

8.S: Search engine optimisation (SEO)(Summary)

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8.2: Introduction

With millions of people performing billions of searches each day to find content on the Internet, Google alone processes over 40 000 searches per second (Internet Live Stats, 2017). It makes sense that marketers want their products to be findable online. Search engines, the channels through which these searches happen, use closely guarded algorithms to determine the results displayed.

Determining what factors these algorithms take into account has led to a growing practice known as search engine optimisation (SEO).

SEO is the practice of optimising a website to achieve the highest possible ranking on the search engine results pages (SERPs). Someone who practices SEO professionally is known as an SEO (search engine optimiser).

Google uses about 200 different factors in its algorithm to determine relevance and ranking (Dean, 2016). None of the major search engines disclose the elements they use to rank pages, but there are many SEO practitioners who spend time analysing patent applications to try to determine what these are.

Note

Take a look at this speculative list of Google's 200 algorithm factors from BackLink: http://backlinko.com/ google-ranking-factors.

> Other types of websites that rely on search, like YouTube and Facebook, have their own algorithms. Facebook's News Feed algorithm, for example, uses around 100 000 factors to rank and sort content that appears in users' news feeds.

SEO can be split into two distinct camps, white hat SEO and black hat SEO, with some grey hat wearers in between. Black hat SEO refers to trying to game the search engines. These SEOs use dubious means to achieve high rankings and their websites are occasionally blacklisted by the search engines. White hat SEO, on the other hand, refers to working within the parameters set by search engines to optimise a website for better user experience. Search engines want to send users to the website that is best suited to their needs, so white hat SEO should ensure that users can find what they are looking for.

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8.3: Key terms and concepts

Table 8.2.1

Term	Definition
Alt text	The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. Also called alt tag. Anchor text is the visible, clickable text in a link.
App store optimisation (ASO)	The process of optimising mobile and web applications for the specific web stores in which they are distributed.
Backlink	All the links from pages on external domains pointing to pages on your own domain. Each link from an external domain to a specific page is known as an inbound/backlink. The number of backlinks influences your ranking, so the more backlinks the better, get linking!
Canonical	In SEO, canonical refers to a definitive URL. The canonical version is the definitive version. Domain name**The easy-to-read name used to identify an IP address of a server that distinguishes it from other systems on the World Wide Web: our domain name is redandyellow.co.za.
Flash	A technology used to show video and animation on a website. It can be bandwidth heavy and unfriendly to search engine spiders.
Heading tags	Heading tags (H1, H2, H3, etc.) are standard elements used to define headings and subheadings on a web page. The number indicates the importance so H1 tags are viewed by spiders as being more important than H3 tags. Using target keyword s in your H tags is essential for effective SEO.
Home page	The first page of any website. The home page gives users a glimpse into what your site is about very much like the index in a book, or contents page in a magazine.
HyperText Markup Language (HTML)	Certain HTML tags are used to structure the information and features within a web page.
Hyperlink	A link in an electronic document that allows you, once you click on it, to follow the link to the relevant web page.
Internal link	A hyperlink on a website that points from one page to another on the same website / domain.
Internet Protocol (IP) address	The Internet Protocol (IP) address is an unique number that is used to represent every single computer in a network.
Keyword frequency	The number of times a keyword or key phrase appears on a website.
Key phrase	Two or more words that are combined to form a search query are often referred to as keywords. It is usually better to optimise for a phrase rather than for a single word.
Keyword rankings	Where the keywords or phrases targeted by SEO rank in the search engine results. If your targeted terms do not appear on the first three pages, start worrying.
Landing page	The page a user reaches when clicking on a paid or organic search engine listing. The pages that have the most success are those that match up as closely as possible with users' search queries.
Link	A URL embedded on a web page. If you click on the link you will be taken to that page.
Link bait	A technique for creating content that is specifically designed to attract links from other web pages.
Meta tags	Tags that tell search engine spiders exactly what a web page is about. It's important that your meta tags are optimised for the targeted keywords. Meta tags are made up of meta titles, descriptions and keywords.

Referrer	When a user clicks on a link from one site to another, the site the user has left is the referrer. Most browsers log the referrer's URL in referrer strings. This information is vital in determining which queries are being used to find specific sites.
Robots.txt	A file written and stored in the root directory of a website that restricts the search engine spiders from indexing certain pages of the website.
Search engine spiders	Programs that travel the web, following links and building up the indexes of search engines.
Universal Resource Locator (URL)	A web address that is unique to every page on the Internet.
Usability	A measure of how easy it is for a user to complete a desired task. Sites with excellent usability fare far better than those that are difficult to use.
XML sitemap	A guide that search engines use to help them index a website, which indicates how many pages there are, how often they are updated and how important they are.

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8.4: Core principles

Understanding SEO

Search engines need to help users find what they're looking for. To make sure, they list the best results first, looking for signals of:

> **Note**
>
> Want to see how search works? Check out this resource from Google: www.google.com/insidesearch/ howsearchworks/ thestory

- Popularity
- Authority
- Relevance
- Trust
- Importance.

SEO, also called organic or natural optimisation, involves optimising websites to achieve high rankings on search engines for certain selected keywords. Generally, techniques used for optimising on one search engine will also help efforts across others.

SEO can be divided into two main strategies:

1. **On-page optimisation**, achieved by making changes to the HTML code, content and structure of a website, making it more accessible to search engines and by extension, easier for users to find.

> **Note**
>
> A good place to keep track of Google search algorithm updates is this handy resource from Moz: moz.com/google-algorithmchange.

2. **Off-page optimisation**, generally focused on building links to the website and covers activities like social media and digital PR.

SEO is an extremely effective way of generating new business to a site. It is a continuous process and a way of thinking about how search engines see your website and how users use search engines to find your website. It's search psychology.

Search engine optimisation is a fairly technical practice but it can easily be broken down into five main areas:

1. A search engine friendly website structure
2. A well-researched list of keywords
3. Content optimised to target those keywords
4. Link popularity
5. User insights.

Search engine friendly website structure

Search engines encounter two kinds of obstacles:

1. Technical challenges that prevent the search engine spider from accessing content.

Note

Read more about this in the Web development and design chapter.

2. A competitive marketing environment where everyone wants to rank highly.

To ensure that search engines can access your content, you must remove technical barriers. Those who want to achieve the best results must follow best practices.

The key is to make sure that there are direct HTML links to each page you want the search engines to index. The most important pages should be accessible directly from the home page of your website.

The information architecture or, how content is planned and laid out, has important usability and SEO implications. Users want to find what they are looking for quickly and easily, while website owners want search engine spiders to be able to access and index all applicable pages. Google consistently points out that it wants users to have a good user experience. Content relevance, user engagement and user experience are all crucial to SEO (Martin, 2016).

Note

Read more about this in the User experience design chapter.

There are times when user experience and SEO can be at odds with each other, but usually if you focus on building usable, accessible websites, then you have made them search engine friendly as well.

Another technical challenge to search engines is Flash. For the most part, search engines struggle to crawl and index Flash sites. There are some workarounds, but the best approach from an SEO perspective is to avoid building sites or delivering key content in Flash. Instead, use HTML5, which provides similar interactivity and visuals while remaining easily crawlable.

The chapter on web development and design delves more deeply into building a search engine friendly website.

Voice search

As digital marketers, we must evolve with the times to stay effective. The ‘’no interface trend’ refers to the way people want new, natural forms of interaction with technology. onsider Stephen Sandmann’s (2016) observation that, “Speech, gesture, touch and sight: truly intuitive technologies are set to transform your customer interactions forever”.

When people think of SEO, they usually think of only the traditional type of SEO, based on desktop and mobile Google search. SEO has evolved to be mobile-centric, which now includes voice search.

Many consumers use Google search on their mobile phones to find answers to their everyday questions. This means you can encourage your consumers to engage with your brand via voice search-accessed mobile search. The Google app allows a person’s voice to access mobile Google search results on their smartphones. Google voice search is a default app in all of the latest Android smartphones.

Other voice search tools include Apple’s Siri, Microsoft’s Cortana and Amazon’s Alexa.

Voice searches are usually made through mobile devices because of their on-the-go convenience factor which means that the mobile context will generally apply. This means:

- The user behaviour relating to voice search differs from traditional mobile search. This may seem obvious, but you have make a conscious effort to accommodate voice search in your Mobile SEO strategy.
- In most cases, voice searches appear in the form of questions, such as, “What movies are showing at Brooklyn Mall?”
- Voice-derived search queries are also usually longer than the average traditional search query.

These differences should be factored into your content by adding local keywords that are geographically relevant and by writing

content that answers common questions that your intended audience may ask.

The future

Google's revamped Google Now, called Google Now on Tap, is incredibly intuitive. Now on Tap is a Google voice search that has contextual awareness. When you do a search via Now on Tap, it scans your phone's screen and recent activities to help give it context for your search, thereby better answering your query to fill in the gaps of a vague search query. Google also makes use of a personal index of what you do on your Android phone as a means of learning more about you.

Siri and other voice search platforms are also making major headway in terms of technological advancements and additional predictive features. Voice search is here to stay and will become more widely used going forward.

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8.5: Implementation

SEO and keywords

How do you start building your keyword list? It requires a little thought and a fair amount of research and insight, using tools that are readily available to help you grow and refine your list of keywords.

> **Note**
>
> Keyword or key phrase? These are usually used interchangeably to refer to single or multiple words used for optimising websites. We largely use 'keyword' in this book, but they are essentially the same.

Keywords are the very foundation of search. When users enter a query on a search engine, they use the words they think are relevant to the search. The search engine then returns those pages it has calculated to be most relevant to the words the searchers used and, increasingly, the implied meaning of the search.

Developers of search engines have built a sophisticated understanding of semantics and the way in which we use language. So, if a user searches for 'car rental', the search engine will look for pages that are relevant to 'car rental' as well assynonyms like 'car hire', 'vehicle hire' and so forth. Search engines have also built up knowledge around common misspellings, typos, synonyms and related searches.

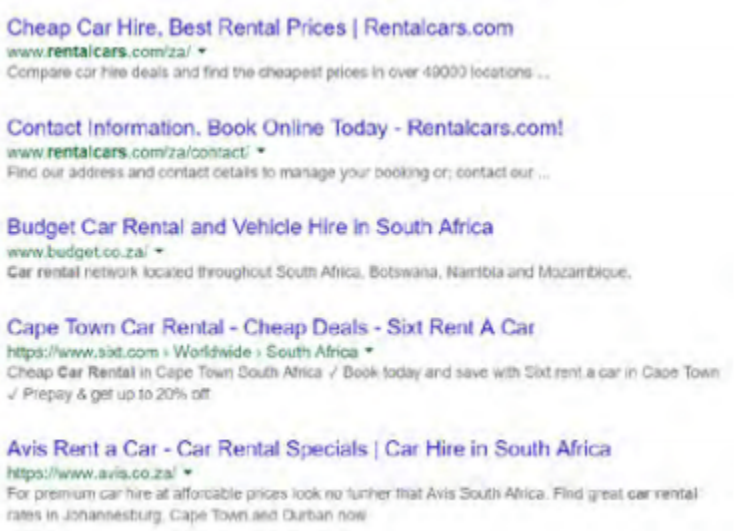


Figure 8.5.1: Google delivers search results for logical synonyms *Adapted From Screenshot, Google search 2017*

It is crucial that you implement keywords that are likely to be used by target audiences. Websites need to appear when potential customers are searching for them. A large part of keyword research is understanding search psychology. When we build our keyword lists, we are tapping into the mental process of searchers and putting together the right mix of keywords to target.

There are four things to consider when choosing a keyword.

1. Search volume

How many searchers are using that phrase to find what they want? For example, there is an estimated monthly search volume of over 338 million for the keyword 'hotel', but an estimated 6 600 searches per month for a keyword such as 'Cape Town Waterfront hotel'.

> If you're researching keywords using the Google AdWords Keyword Planner, note that it reports only on paid search volume, not on total volume and Google has made access more difficult for free accounts.

2. Competition

How many other websites out there are targeting that same phrase? For example, Google finds over 2 900 000 000 results for 'hotel', but only 640 000 for 'Cape Town Waterfront Hotel'.

3. Propensity to convert

What is the likelihood that the searcher using that keyword is going to convert on your site? A conversion is a desired action taken by the visitor to your website. Related to propensity to convert is the relevance of the selected term to what you are offering. If you are selling rooms at a hotel at the V&A Waterfront, which of the two terms, 'hotel' or 'Cape Town Waterfront hotel', do you think will lead to a higher rate of conversions?

4. Value per lead

What is the average value per prospect attracted by the keyword? Depending on the nature of your website, the average value per lead varies. Using the hotel example again, consider these two terms:

'Luxury Cape Town hotel' and 'budget Cape Town hotel'. Both are terms used by someone wanting to book a hotel in Cape Town, but it is expected that someone looking for a luxury hotel is intending to spend more. That means that this particular lead has a higher value, particularly if you have a hotel booking website that offers a range of accommodation.

Step-by-step keyword research

Step 1: Brainstorm

Think about the words you would use to describe your business and about the questions or needs of your customers that it fulfils. How would someone ask for what you are offering? Consider synonyms and misspellings as well.

Bear in mind that people may not ask for your services using the same words as you to describe them. You may sell 'herbal infusions', whereas people may ask for 'herbal teas' and some might even request a 'tisane'.

Even common words are often misspelt and you may need to consider common misspellings and typos, for example, 'jewelry' or 'morgage'.

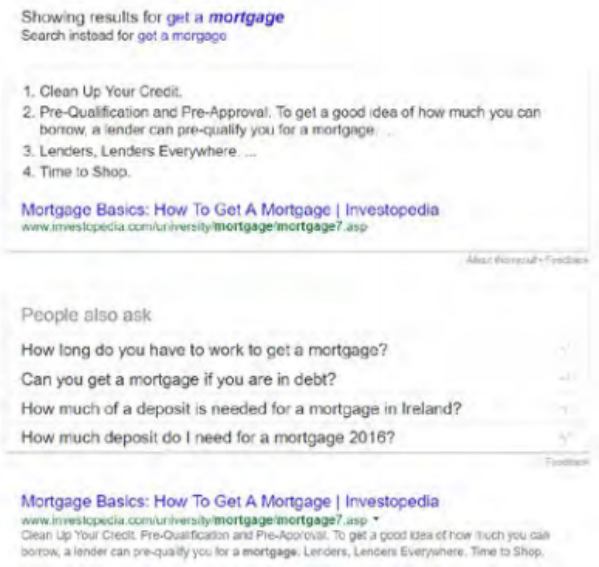


Figure 8.5.2: Google returns relevant results even for common misspellings *Adapted From Screenshot, Google search 2017*

Misspellings are important, but consider what these tell you about the traffic you're getting and analyse this traffic to ensure that you're getting quality visitors.

Step 2: Gather data

Two ways in which to gather accurate keyword data are to survey customers and to look at your website referral logs.

Look at what terms customers are already using to find you and add those to your list. If they are already sending you some traffic, it is worth trying to increase that traffic.

Step 3: Use keyword research tools

There are several tools available for keyword discovery and some of them are free. Some tools will scan your website and suggest keywords based on your current content. Most will let you enter keywords and will then return suggestions based on past research data, along with: *

- Similar keywords
- Common keywords used with that keyword
- Common misspellings
- Frequency of the keywords in search queries
- Industry-related keywords
- Keywords that are sending traffic to your competitors
- How many sites are targeting your keywords?

Note

Try it now: Pick one of the tools listed at the end of the chapter and try a little of your own keyword research. Can you discover any useful keywords that your favourite brand should be using?

See section 8.7 Tools of the trade for some tools that you can use.

Bearing in mind the factors that make a good keyword, you need to aim for the right mix of keywords. Low-volume terms with low levels of competition may be a good way to get traffic in the short term, but don't be scared off by bigger competition in the high-value, high-volume areas. It may take longer to get there, but once you do, the revenue can make it worthwhile.

It is a good idea to create a spreadsheet of the list of keywords, along with additional information about each one.

Keyword or phrase	Search volume	Competition	Propensity to Convert	Value of Lead
Hotel	3,870	90%	2%	$18
Luxury hotels	345	80%	35%	$35

Figure 8.5.3: Keep a spreadsheet of targeted keywords for reference *Adapted From Stokes, 2013*

This will help you to choose the right keywords to target. These lists should be created for the whole website and can then be broken down for each page you want to optimise.

Optimising content for keywords

Once keywords and phrases are selected, we need to ensure the site contains content to target them. You must ensure that the content is properly structured and that it sends relevance signals. Content is the most important part of your website so create relevant, targeted content aimed at your selected keywords. Remember, search engines can recognise context and implied meaning, so synonyms are important.

Content has several roles to play on your site.

- It must provide information to visitors.
- It must engage with them.
- It must persuade them to do what you want. *

Now it must also send signals of relevance to search engines. You need to use the keywords on the content page in a way that search engines will pick up and users will understand.

Each web page used to be optimised for a set number of keywords. With the increasing sophistication of search engines and their semantic awareness, however, pages are now optimised for themes instead – search engines have moved from keywords to concept and context. For example, one page might be optimised for car insurance, with relevant keywords used as required, while another page would be optimised for health insurance, or household insurance.

Search engines consider context in three ways:

1. **User intention** – Google tries to match your query to what you are asking rather than the individual words used. “Song about evil ducks” gives you “March of the Sinister Ducks” as a result, rather than a page with those specific keywords.
2. **Your content** – Google reads your pages’ keywords to find out what they are about, conceptually.
3. **Relating concepts** – Google relates concepts to each other, like showing Alan Moore as author of March of the Sinister Ducks and offering related results for his work.

While keywords are still useful, then, focus has shifted from repeatedly using keywords to ensuring that each page is about something specific. Even though you should be thinking customer first rather than exact keywords, keywords are still useful. Here are some guidelines.

1. **Title tag:** Use the keyword in the title and as close to the beginning as possible.
2. **H1 header tag:** Use the keyword in the header tag and as much as possible in the other H tags.
3. **Body content:** Use keywords as it makes sense in context. Remember to use synonyms rather than focusing on one specific version of a keyword. You should aim for about 350 words of content. But don’t overdo it or it could look like spam to the search engines.
4. **Bold:** Use tags around the keyword at least once.
5. **URL:** Try to use the keyword in your page URL.
6. **Meta description:** Use it at least once in the meta description of the page, which should entice users to clickthrough to your site from the SERP.
7. **Link anchor text:** Try to ensure that the keyword is used in the anchor text of the pages linking to you.

Optimising media

Images, video and other digital assets should also be optimised with the relevant keywords. Search engines cannot decipher multimedia content as well as text, so they rely on the way that media is described to determine what it is about. Screen readers also read out these descriptions, which can help visually impaired users make sense of a website. In addition, media such as images and video are often also shown on the SERPs. Proper optimisation can give a brand more ownership of the SERP real estate and can also be used effectively to target competitive terms.

> **Note**
>
> Read more about this in the Video marketing chapter.

Just as rich media can help emphasise the content on a page to a visitor, they can also help search engines to rank pages, provided they are labelled correctly.

Here are some ways to optimise images with keywords for SEO.

- Use descriptive, keyword-filled filenames.
- Use specific alt tags and title attributes.
- Add meta information to the image. Make sure this information is relevant.
- Use descriptive captions and keep relevant copy close to the corresponding media. For example, an image caption and neighbouring text will help to describe content of the image.
- Make sure that the header tags and images are relevant to each other.
- Think about what other digital assets you have and whether these can be optimised in line with your keyword strategy. For example, consider using app store optimisation (ASO) which is the process of optimising your mobile and web apps for the specific web stores in which they are distributed.

> **Note**
>
> Find out how to optimise your apps in the Mobile channels and apps chapter.



Figure 8.5.4: An example of a page targeting the theme 'handmade bags *Adapted From Stokes, 2013*

> **Note**
>
> As search engines become ever more sophisticated and user focused, creating entertaining and readable copy will be much more important than simply including keywords in your text.

The best way to ensure results is to focus on writing quality content while sticking to a few guidelines on tags and URLs.

Remember, you want search engines to rank you highly for your content, but you also want to ensure that the content is a pleasure to read.

Regularly adding fresh, valuable content will also encourage the search engines to crawl your site more frequently.

Use your website and its pages to establish and reinforce themes. Information can always be arranged in some kind of hierarchical structure. Just as a single page can have a heading and then be broken down into sub-headings, a large website can have main themes that are broken down into sub-themes. Search engines will see these themes and recognise your website as one with rich content.

Link popularity

Links are a vital part of how the Internet works. The purpose of a link is to allow a user to go from one web page to another. Search engines, mimicking the behaviour of humans, also follow links.

Besides allowing search engine spiders to find websites, links are a way of validating relevance and indicating importance. When one page links to another, it is as if that page is voting or vouching for the destination page. Generally, the more votes a website receives, the more trusted it becomes, the more important it is deemed, and the better it will rank on search engines.

Links help send signals of trust. Signals of trust can come only from a third-party source. Few people will trust someone who says, “Don’t worry, you can trust me!” unless someone else, who is already trusted, says, “Don’t worry, I know him well. You can trust him.” It is the same with links and search engines. Trusted sites can transfer trust to unknown sites via links.

Links help to validate relevance. Text links, by their very nature, contain text (thank you, Captain Obvious). The text that makes up the link can help validate relevance. A link such as ‘Cape Town hotel’ sends the message that, “You can trust that the destination site is relevant to the term ‘Cape Town hotel’.” If the destination web page has already used content to send a signal of relevance, the link simply validates that signal.

The parts of a link

Here is an example of the HTML code for a link:

Anchor Text

and are HTML tags that show where the link starts and ends.

www.targeturl.com/targetpage.htm is the page that the link leads to. You should make sure that you are linking to a relevant page in your site, and not just to the home page.

Anchor Text is the visible text that forms the link. This is the text that should contain the keyword you are targeting.

The link sends a signal that the target URL is important for the subject used in the anchor text.

There can be a lot more information included in this anatomy, such as instructions telling the search engine not to follow the link, or instructions to the browser on whether the link should open in a new window or not.

Anchor Text

rel=“nofollow” can be included in links when you don’t want to vouch for the target URL. Search engines do not count nofollow links for ranking purposes. This was introduced by Google to try to combat comment spam.

Not all links are created equal

Of course, not all links are equal. While link volume is the number of links coming to a specific page of your site, link authority looks at the value of the links. Some sites are more trusted than others. Since they are more trusted links from those sites are worth more. Likewise, some sites are more relevant than others to specific terms. The more relevant a site, the more value is transferred by the link.

Well-known and established news sites, government sites (.gov) and university domains (.ac) are examples of sites from which links can carry more weighting.

Sites with higher authority carry more link weight.



Figure 8.5.5: Links from universities and government bodies carry more weight *Adapted From Screenshot, Google search bar, 2017*

Note

Discussion: Why are government and university websites considered to have more authority? What sorts of websites would they be likely to link to?

Search algorithms also consider relationships between linked sites. By analysing various elements, search engines try to determine if the links are natural links, or if they are manipulative, artificial links created solely for ranking purposes.

Manipulated links are worth very little compared to natural links and may even lead to a drop in search engine rankings. The Google algorithm update focused on reducing spammy links, called Penguin, was released in 2012.

The search engine algorithm will also determine the relevancy of the referring website to the site being linked to. The more relevant the sites are to each other, the better.

Also keep in mind that linking to valuable, relevant external resources can help to improve the visibility of your own site.

How does a website get more links?

With links playing such a vital role in search engine rankings and traffic for a website, everyone wants more of them. There are certainly dubious means of generating links, most of which can result in penalties from the search engines. However, here are some ways for ethical and honest website owners and marketers (that's what you are) to go about increasing links to their websites.

Create excellent, valuable content that others want to read

If people find your site useful, they are more likely to link to it. It is not necessary (or possible) to try to write content that will appeal to the whole of the Internet population. Focus on being the best in your industry and in providing value to the members of that community. Make sure that valuable content is themed around your keywords.



Figure 8.5.6: Ensure that you create remarkable, valuable content that people want to link to *Adapted From Stokes, 2013*

Infographics are visual and graphic representations of data, and are a popular type of content that is useful to users, and can

encourage lots of traffic and inbound links.

Create tools and documents that others want to use

Interview experts in your field, and host those interviews on your website. Create useful PDF guides for your industry that people can download from your site. Think outside the box for quirky, relevant items that people will link to. Calculators are popular tools, and we don't just mean the ones that add two and two together. If you have a website selling diet books, for example, create a tool which helps users to calculate their body mass index (BMI) and target weight. Importantly, be unique!



Figure 8.5.7: The BBC website has several interactive elements, such as this BMI calculator *Adapted From BBC, 2014*

Create games

Creating a game that people want to play is a great way to generate links. Make sure that the theme of the game is based on the keywords for your website so that when others talk about and link to the game they are using your keywords.

Capitalise on software and widgets

Widgets, browser extensions and other software that users love to use all help to generate links for a website. For example, the TripAdvisor widget enables hotels, attractions, restaurants, destination marketers, and bloggers to add TripAdvisor content such as reviews, awards, and local area attractions to their website.

> Be creative! The best link-building strategies are those that provide value and automate the linking process as much as possible. The easier it is for someone to share your link, the more likely they are to do it.

Competitor analysis

You can find out who is linking to your competitors, and which non-competing sites are ranking highly for your keywords. Use this information to identify sites to target for link requests.

Until January of 2017, using Google search along with the 'link:' command could be used to find these links and websites. Now, however, a better alternative is to use the data in your Google Search Console account, formerly known as Webmaster tools. Learn more here: www.google.com/webmasters

You can also use paid tools that provide link index data, such as:

- majestic.com

- www.linkresearchtools.com
- ahrefs.com
- www.opensiteexplorer.org.

With all link-building tactics, make sure to use your keywords when communicating. You will be telling people how to link to you, and ensuring that search engines notice your authority.

User insights

Search engines want their results to be highly relevant to web users, to make sure that web users keep returning to the search engine for future searches. And the best way to establish what is relevant to users? By looking at how they use websites, of course!

User data is the most effective way of judging the true relevance and value of a website. For example, if users arrive on a website and leave immediately, chances are it wasn't relevant to their query in the first place. However, if a user repeatedly visits a website and spends a long time there, it is probably extremely relevant. When it comes to search engines, relevant, valuable sites are promoted, and irrelevant sites are demoted.

How do search engines access this data?

Search engines use cookies to maintain a history of a user's search activity. This will include keywords used, and websites visited from the search engine. Search engines gather data on the clickthrough and bounce rates of results.

Site speed, that is, the performance of your website, is one of the contributing factors to ranking in Google (Dean, 2016). In fact, this is becoming increasingly important. Check out Google's PageSpeed tool to help analyse your site's performance. It will recommend ways to improve your site's speed and mobile-friendliness: https:// developers.google.com/speed/pagespeed/

Google's AMP project also underlines the importance of site speed for users and thus to Google themselves (and thus, of course, to your SEO). Accelerated Mobile Pages (AMP) essentially simplifies HTML, CSS, and JavaScript elements to serve stripped-down pages containing only the most essential elements to mobile users. This leads to anything from a 15% to an 85% improvement in site speed (Chung, 2015).

So, what does this mean for SEO? When it comes to a website, it must: *

- Be valuable enough to attract both visitors and links naturally.
- Retain visitors and make sure they return to the website.
- Convert visitors.

Social and search

Social information is playing an ever-increasing role in search. Social content, such as Twitter messages or YouTube videos, can appear in the SERPs and there is a growing indication of social influence on search rankings.

There are several social factors to consider for social and search.

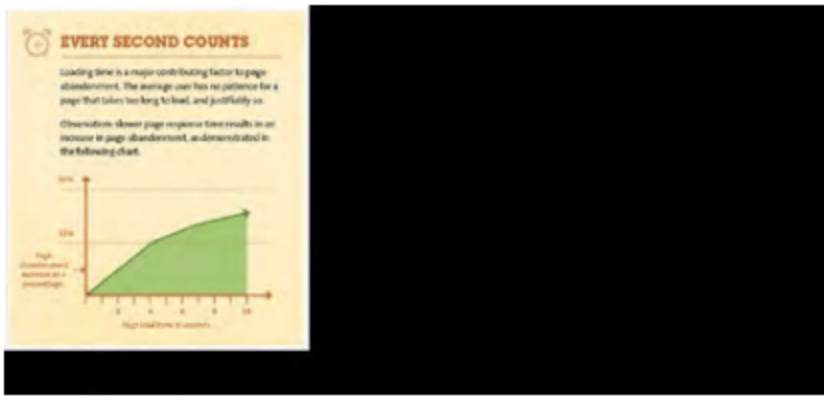


Figure 8.5.8: A Google search for Coca-Cola turns up several social media profiles *Adapted From Screenshot Google search, 2017*

1. Use social media properties to dominate brand SERPs.

When someone searches for your brand name, you can use your social media properties to 'own' more of the results on that page, reducing the likelihood that a user will end up on a competitor's website instead. Use your brand name when naming Twitter and Flickr profiles and Facebook and YouTube pages.

2. Social links are used as signals of relevance.

Links from social sites such as Twitter include 'rel=nofollow'. However, there is a strong indication that these links are in fact followed by search engines, and are used to determine relevance. If you focus on creating great content on your site and making sure that it is easy to share socially, you should see a result in your SEO efforts.

3. Personalised results are influenced by your online social network.

If you are logged in to a social network while searching such as Facebook for Bing, or your Gmail account for Google, you could see results from or influenced by your social circle. In Bing, for instance, results can include indications of what your friends have previously liked or shared via Facebook. On Google, you may be more likely to see a friend's blog for relevant searches.

4. Optimise for social search engines.

Google is the biggest search engine worldwide, YouTube is the second biggest and Facebook is growing. Even within social properties, users still use search to find the content they are looking for. Content that is housed on these properties should be optimised for the relevant social search engine as well.



Figure 8.5.9: A YouTube search for 'Chrysler' turns up official branded videos in the top positions *Adapted From Screenshot, YouTube. 2017*

Mobile search

As web-enabled mobile devices continue to grow in the market, and become easier to use, mobile search remains a key growth area. Mobile searches tend to be different to desktop searches. They are more navigational in nature as users tend to know where they want to end up, and users are often looking for concise, actionable answers.

The need for a website that performs well on mobile became crystal clear in 2015, when Google made what is called the mobilegeddon update, that is, sites that perform well on mobile are given higher rankings, while sites that do not perform well on mobile are penalised.

> You can find a good overview of mobile SEO and how to create a website easily accessible via mobile here, note that responsive design is Google's recommendation: https://developers.google.com/webmas...es/mobile-seo/

Mobile search input can also be different from desktop search. As well as typing in search keywords, mobile users can search by voice, or by using images or scanning barcodes.

As with mobile web development, mobile SEO is a little different from desktop SEO, although the fundamental principles remain the same. Build usable and accessible sites with great content, and you've already come a long way.

> **Note**
>
> Read more about this in the Web development and design chapter.

Differences in approach for mobile SEO are largely because:

- Search engines have the ability to deliver precise location-based results to mobile users.
- Usability is critical in sites for mobile devices.
- Search engines have less data to work with compared to traditional web in terms of site history, traffic, and inbound links.

> **Note**
>
> Why is usability so important for mobile SEO?

The fundamentals of mobile SEO are not so different to those of desktop SEO.

1. A usable, crawlable site is very important.

Build mobile versions of your website that cater for mobile users having simple navigation and content stripped down to only what is required.

2. Content is important, and should be formatted for mobile usage.

Text and images should be optimised for the mobile experience, so no large file sizes! The meta data still matters and titles and descriptions are what users see in the SERPs.

3. Links are important.

You should link to your mobile site from your desktop site and vice versa. Submit your mobile site to relevant mobile directories.

4. Submit a mobile XML sitemap.

Mobile-specific sitemaps use the same protocols as standard XML sitemaps with the addition of a mobile tag.

5. Use the word 'mobile' on the mobile website, or use mobile top-level domains.

Make it explicit to search engines that this is the mobile version of your website and they are more likely to prioritise it as such.

Local search

Local search refers to search behaviour and results where location matters. Either results returned are local in nature, or results returned can be map based.

With blended SERPs, map-based results can be returned together with other types of results, depending on the type of search. As search engines become more sophisticated, location can be inferred and influence the types of results.

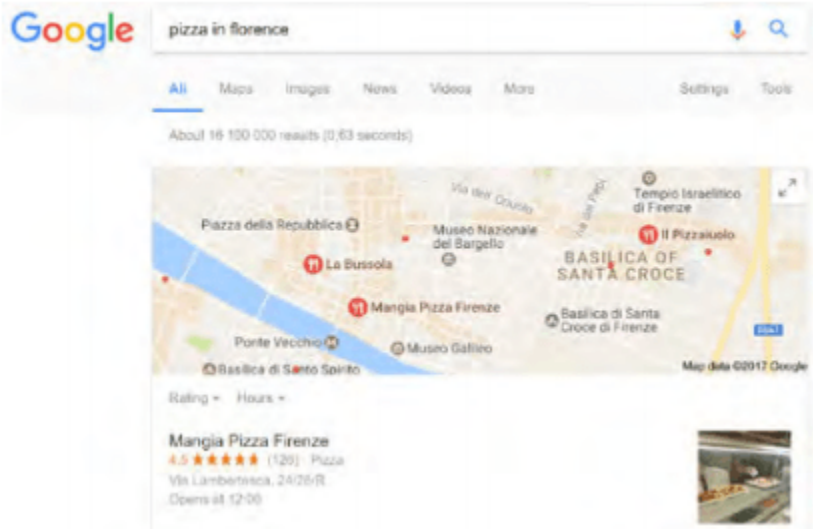


Figure 8.5.10: A Google search for 'pizza in Florence' turns up a range of location-based results, displayed on a map *Adapted From Screenshot, Google search, 2017*

A user may search for 'plumber london', for example, and the search will know to return results for London plumbers. These may even be returned on a map.

However, a user in London may search just for 'plumber'. The search can infer from the user's IP address that the user is in London, and still return results for London plumbers, since someone searching for this term is likely to be looking for a nearby service.

For search engines to return location-relevant results, they need to know the location of elements being searched. This is often determined from sites that include the name and address of a business. Note that this site may not be yours. Location results are often determined from various review sites, and the results can include some of those reviews.

> **Note**
>
> Find the Small Business Guide to Google My Business here: www. simplybusiness.co.uk/ microsites/google-mybusiness-guide/

Search engines also allow businesses to 'claim' their locations. For example, Google's Google My Business function allows small businesses to enter their information, which will then populate into all Google services. A business can set up a local or a brand page on Google which, once completed, will give them access to various page management and optimisation tools as well as making them more visible on SERPs.

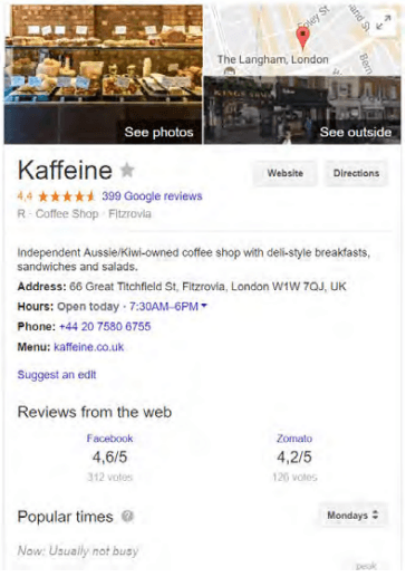


Figure 8.5.11: A Google search for a specific business reveals its Local page in the SERP *Adapted From Screenshot, Google search, 2017*

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8.6: What not to do

Black hat SEO refers to practices that attempt to game the search engines. If a search engine uncovers a website using unethical practices to achieve search engine rankings, it is likely to remove that website from its index.

Google publishes guidelines for webmasters, available through Google's Webmaster Central (www.google.com/webmasters). As well as outlining best practice principles, Google has supplied the following list of don'ts:

- Avoid hidden text or hidden links.
- Don't use cloaking or sneaky redirects.
- Don't send automated queries to Google.
- Don't load pages with irrelevant keywords.
- Don't create multiple pages, subdomains, or domains with substantially duplicated content.
- Don't create pages that include malicious behaviours such as phishing or installing viruses, trojans, or other malware.
- Avoid 'doorway' pages created just for search engines or other 'cookie cutter' approaches, such as affiliate programmes with little or no original content. If your site participates in an affiliate programme, make sure that your site adds value. Provide unique and relevant content that gives users a reason to visit your site first.
- Avoid link farms and focus on attracting quality, valuable links.

The bottom line: design websites for users first and foremost, and don't try to trick the search engines. It will only be a matter of time before they uncover the black hat techniques.

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8.7: Advantages and challenges

Optimising a website for search engines should entail optimising the website for users. Done properly, it should result in a better user experience, while ensuring that search engines index and rank the website well.

It can be tempting to focus on the technicalities of SEO while forgetting that both robots and humans need to read the same website. One should not be sacrificed for the other.

Search engines update their algorithms regularly. Each update is an attempt to improve search results, but can result in loss of rankings for some websites, depending on the update. A contingency plan, such as a pre-prepared search advertising campaign, needs to be in place to cope with a sudden drop in rankings.

As with any digital marketing practice, SEO should not be the only focus of digital marketing efforts. It works best when part of a holistic online marketing strategy The SEO community is constantly sharing insights about search algorithms, whenever a new one is released, do some research on the best ways to avoid being penalised.

> The SEO community is constantly sharing insights about search algorithms, whenever a new one is released, do some research on the best ways to avoid being penalised.

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8.8: Tools of the trade

There are a number of tools available to assist with SEO. Some are made available by search engines, and some are developed by agencies and individuals who specialise in SEO. Most are available for free.

Google Search Console

www.google.com/webmasters

Google provides guidelines to webmasters and tools to help ensure your website is being indexed.

Open Site Explorer

moz.com/researchtools/ose

Moz provides a useful tool called Open Site Explorer, which can help you determine the value of links from particular sites.

Tools from SEOBook

tools.seobook.com

SEObook provides a number of tools that assist any SEO. For example, Rank Checker is a Firefox extension that allows you to save a number of keywords and to perform regular searches on them, giving you the ranking of your chosen URL for each keyword in the search engines selected. They also have tools to help with keyword discovery.

Keyword discovery tools

There are a number of tools available, some free and some paid for, to assist with keyword discovery. Some include:

Google AdWords Keyword Planner

adwords.google.com/keywordplanner

Trellian's KeywordDiscovery tool

www.keyworddiscovery.com

Wordtracker

www.wordtracker.com

Bing Ads Intelligence

advertise.bingads.microsoft.com/en-us/bing-ads-intelligence

SEO PowerSuite Rank Tracker (the trial version has limited functionality)

www.seopowersuite.com/rank-tracker

Link-Assistant .Com

link-assistant.com

Online forums

Webmaster World (www.webmasterworld.com) is frequented by SEOs and webmasters aiming to stay current with latest trends and search engine updates.

Google Merchant Center

www.google.com/merchants

The Google Merchant Center allows you to mark up any products you sell through eCommerce, ensuring that they also rank for relevant search results.

MozBAr

The Moz SEO toolbar (moz.com/products/pro/seo-toolbar) gives instant metrics while viewing SERPs or web pages.

Screaming Frog

Screaming Frog (www.screamingfrog.co.uk/seo-spider) allows you to crawl website URLs and analyse the onsite SEO.

AWR

AWR (www.awrcloud.com/login.php) gives you access to rankings for desktop, mobile, and local searches.

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8.9: Case study - Lloyds Pharmacy Online Doctor

One-line summary

A strong search strategy led to a 144% increase in organic sessions and a large increase in organic revenue for Lloyds Pharmacy Online Doctor (Digital Training Academy, 2016).

The challenge

Lloyds Pharmacy Online Doctor provides an extra channel for providing healthcare to patients with health problems that they may find embarrassing or inconvenient to treat using face-toface care. They needed to increase search visibility and thus organic traffic results to replace the heavy spending they were doing on PPC advertising to drive online traffic.

The solution

The brand's agency, Click Consult, identified gaps in the Online Doctor website's backlink profile and decided to enhance it. They invested in blogger, social, and PR outreach, identifying and creating relationships with industry influencers that would be willing to showcase innovative content to their audience.

They created the "Let's Type About Sex" campaign, creating an app and animations, carefully placing their content, which led to strong blogger engagement.



Figure 8.9.1: One article in the Let's Type About Sex campaign *Adapted From Screenshot, Google search, 2017*

The results

The campaign led to an increase in the authority of the site, as well as:

- An increase in the number of page 1 terms to 36
- A 144% increase in organic sessions
- A 43% increase in overall sessions
- A 77.59% increase in organic revenue
- A 17% increase in online revenue.



Figure 8.9.2: The Lloyds Pharmacy Online Doctor website *Adapted From Screenshot, Lloyds pharmacy, 2017*

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8.10: The bigger picture

Search engine optimisation can be influenced and enhanced by most other digital marketing campaigns and they should all be approached with this in mind.

SEO and content marketing go hand in hand, since SEO relies on fresh, relevant and popular content and content marketing can be informed by SEO keywords and insights.

For example, search advertising campaigns can provide valuable keyword research, which can then be fed into the SEO strategy. Social media marketing can generate an enormous amount of links to a website. Digital PR aims to generate links too, and these can be optimised for search engines.

User research and web analytics can generate insights into how users find the website, which can inform SEO strategy, and effective SEO techniques can provide insights into user behaviour.

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8.E: Search engine optimisation (SEO)(Exercises)

Case study questions

1. Why did Click Consult decide to focus on improving Online Doctor's backlink strategy?
2. Why did improving the site's authority also improve their SEO results?
3. Why did Online Doctor want to focus on SEO rather than PPC?
4. Do you think search engine algorithms can help businesses become better at what they do?

Chapter questions

1. Why do links send signals of trust to search engines?
2. Why is it better to have more niche pages of content than fewer pages that cover a lot of content?
3. How can analysing the links to a competitor's website help aid your own link building strategy?
4. Why is it important for search engines to keep updating their algorithms?
5. If metadata are no longer used for ranking purposes, why do they still have an important role in SEO?

Further reading

www.moz.com – Moz provides regular articles, guides and blog posts covering all things SEO. As well as sharing insights from their own SEO efforts, there are also vibrant forums where you can learn from others.

www.seobook.com – Aaron Wall's SEObook.com provides training and tools for SEO, as well as regular articles and posts.

www.webmasterworld.com – a forum for webmasters, from beginners to those who've been around. A great resource for a budding SEO.

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8.S: Search engine optimisation (SEO)(Summary)

The average website receives a significant proportion of its traffic from search engines, highlighting the importance of SEO.

There are two types of search results:

1. Organic or natural results
2. Paid results.

SEO aims to improve a website's ranking in the organic results. Search engine optimisation is a fairly technical practice but it can easily be broken down into five main areas:

1. A search engine friendly website structure
2. A well-researched list of keywords
3. Content optimised to target those keywords
4. Link popularity
5. User insights.

Growing trends in SEO include the influence of social content on search results, mobile SEO and local search. Google is placing more and more emphasis on a mobile-first approach.

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9: CREATE - DIGITAL COPYWRITING

Learning Objectives

In this chapter, you will learn:

- The principles of writing for your web audience.
- Which types of web copy are available to you.
- The basics of HTML for formatting online text.
- How to write for search engine optimisation (SEO), focusing specifically on keywords.
- The best practices for successful online copywriting.

9.1: Introduction to Digital Copywriting

9.2: Key terms and concepts

9.3: Core principles

9.4: Implementing writing for digital

9.5: Advantages and challenges

9.6: Measuring Success

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9.8: Tools of the trade

9.9: Case study - Yelp

9.10: The bigger picture

9.E: Digital copywriting(Exercises)

9.S: Writing for Digital(Summary)

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9.1: Introduction to Digital Copywriting

Online copy is a hardworking multi-tasker. It must provide information to visitors, engage with them, convince them to take a desired action and, all the while, convey brand ethos. It also has to provide context and relevance to search engines. It needs to achieve all this without seeming as if the author is trying too hard to ensure a particular outcome.

You will see in this chapter that writing for digital is different from writing for more traditional media. Because of the sheer volume of information on the Internet, quality content is king. Many people argue that content is one of the most significant determinants of the success of your online campaigns. Considering it is one of the most direct lines of communication with your consumers, this is not surprising. Therefore, you will see many links between this chapter and the chapter on Content marketing strategy.

> **Note**
>
> Read more about this in the Content marketing strategy chapter.

Online copywriting involves everything from the text on a website to the subject line of an email and all things in between. From PR articles of 800 words to four-line search adverts, if it's being read on a screen, no matter what the size of that screen, from desktop computer to mobile phone, it's online copy. Writing for digital does not mean the traditional rules of writing need to be abandoned. By and large, the foundations remain.

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9.2: Key terms and concepts

Table 9.2.1

Term	Definition
Above the fold	The content that appears on a screen without a user having to scroll.
Active verb	A word that conveys action or behaviour, and in a call to action, tells a reader what to do.
Audience	The group of people at which a marketing communication is targeted.
Benefit	The positive outcome for a user that a feature provides.
Call to Action (CTA)	A phrase written to motivate the reader to take action such as sign up for our newsletter or book car hire today
Dynamic keyword insertion	In paid search advertising, this allows keywords used in searches to be inserted automatically into advert copy.
Feature	A prominent aspect of a product that is beneficial to users.
HyperText Markup Language (HTML)	Code used to structure the information and features within a web page.
Keyword stuffing	The process of intentionally putting too many keywords into the metadata of the website or using many irrelevant keywords. Search engines can penalise websites using this practice.
Mass customisation	Tailoring content for many individuals. Metadata information that can be entered about a web page and the elements on it in order to provide context and relevant information to search engines.
Persona	A character created to define a group of readers in order to speak to them as though they were a unique reader, creating the feeling of a one-on-one conversation.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click of the advert.
Sender alias	The name that is chosen to appear in the sender or 'from' field of an email.
Search engine optimisation (SEO)	The process of improving website rankings on search engine results pages.
Search engine results page (SERP)	The actual results returned to the user based on their search query.
Tone of voice	The register, formality and personality that comes through in the text.
Unique selling point (USP)	The aspect that makes your offering different from your competitors'.

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9.3: Core principles

Writing for an audience

In marketing and advertising, knowing your audience is vital. It will guide you in developing your content strategy, determining the topics they are interested in, and help you organise information in a way that makes sense to them. It will direct how you express your copy for your audience.

Step one of writing for digital is to ensure you have researched your audience and understand what they want. Once you have a clear idea about this, you can figure out how to fulfil those needs using your copy. Smashing Magazine (2015) recommends answering the following questions:

1. Who are you writing for?
2. What is the main message you want to get across?
3. Where does the action take place (where will it be read)?
4. When is it relevant?
5. Why is it important (what's the goal)?

For example, your answers might look like this:

1. Who: First-time moms
2. Message: Our baby kit can help you
3. Where: Parenting forums/magazines/social media
4. When: Immediately before and after the birth of a child
5. Why: Because first-time moms need help (and because we want them to buy our product).

When you are researching your audience, there are two useful concepts to bear in mind, the audience of one, and personas.

The audience of one

According to Price and Price, audiences were traditionally thought of as a vast and vaguely defined crowd (Price & Price, 2002). Because the web provides a voice to individuals and niche groups, the concept of this mass audience is disintegrating.

Price and Price go on to argue that the Internet has led to an audience of one (Price & Price, 2002). What does this mean? While your audience is not literally one person (and if it is, thank your mum for reading your copy, but spend some time growing your readership), it is not a vast, vaguely defined crowd either. Instead, the web has many niche audiences who are used to being addressed as individuals. Indeed, The Economist Group (2015) confirms that personalised marketing is becoming more granular, helping to create specialised customer experiences that will keep them coming back.

The individual that you have in mind when you are writing could also be called a persona.

Take the time to think about **how** web and mobile content is consumed in the physical world. It's usually an exclusive action, so write your copy this way.

Personas

A persona is a profile that a writer creates to embody the characteristics of the target audience for whom he or she is writing.

Personas are based on the profile of readers of your copy. Creating a profile is all about considering the characteristics of your readers and their needs and desires. When you are building this profilethere are a number of things that you should consider about your audience:

- Are they primarily male, female or a mixture?
- How old are they?

- What are their other demographics and psychographics?

Once you understand these simple characteristics, you can ask yourself some more in-depth questions. If you are selling something, questions could include:

- How do they make purchasing decisions?
- Do they compare many service providers before selecting one?
- Do they make lists of questions and call in for assistance with decision making, or do they make purchase decisions spontaneously based on a special offer?

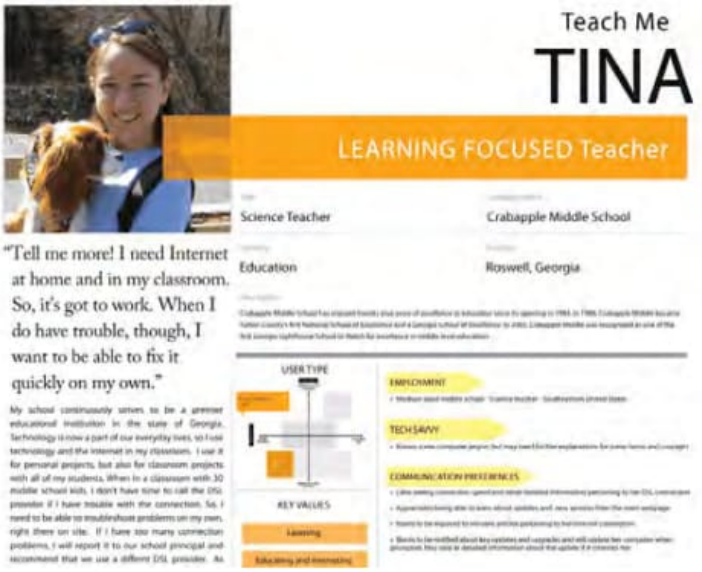


Figure 9.3.1: A sample persona *Adapted From UXMag, n.d.*

Understanding the reader profiles of your readers is an important process and the best copy usually results from extensive time spent figuring out your audience.

Tailoring your copy to your audience does not necessarily limit you to one persona.

Digital copy can be structured so that it caters for several personas. Consider that your various marketing channels may have different audiences, so ensure that you have a persona for each main platform you use. However, you need to spend time understanding their needs before you are able to write copy that addresses these personas.

Types of web copy

Whether it is long or short, the purpose of content is to communicate a message. Communication implies that the message has been both received and understood. The considerations covered here are aimed at ensuring that when you distribute a message, it is communicated effectively to the people whom you want to receive it.

To communicate the intended message effectively, content needs to be:

- Clear and concise
- Easy to read
- Well-written
- Well-structured.

Content written for the web can be divided into two broad categories, short copy and long copy. The division is by no means scientific.

Short copy

On the web, writers often have very little time and space to get a message across to a visitor, and to entice them to take action. This is especially true of banner and search adverts but is also important across all digital marketing disciplines. Probably the most important short copy anywhere is the call to action.

Call to action

Users scan web pages and look for clues on what to do. Tell them. A call to action is a short, descriptive instruction that explicitly tells a reader what to do, for example, ‘Click here’ or, ‘Buy this now’. Any time there is an action you want a reader to take, a call to action should instruct them on what to do. This means using active verbs when you write, and crafting hyperlinks to be clear instructions that resonate with your visitors at each step in the conversion process.

Also, know where to place your call to action so that it makes sense to a reader’s eye. For example, depending on the structure of your page, it might be better to start with your call to action and then to qualify it. In other cases, ending the page with your call to action may have a stronger impact on the reader as they may be more likely to act once they have the information they need to do so. This depends on your product and the action you want your audience to take.

Banner advertising involves clear calls to action, and they can also be used in social media posts, search adverts, content marketing and more. Call to action copy is not limited to short copy. Email newsletters and promotions should also make use of calls to action and we even see them all over web pages. Each piece of online copy should be written with a CTA or at least with the question, “What’s next?” in mind.



Figure 9.3.2: CTAs should be clear and enticing *Adapted From Screenshot, Lynda.com, 2016*

A good call to action resonates with the action the users need to take, as opposed to the technical function that is performed. For example, if a user has entered an email address to sign up to your email newsletter, the action button should say ‘Sign up’ and not ‘Submit’. Make sure you write your instructions for humans. Think about what real people prefer to read!

Also consider what actions mean offline. For an email newsletter, ‘Sign up’ can have very different connotations from ‘Subscribe’. Furthermore, ‘Subscribe’ is very different from ‘Subscribe for free’.

Whereas subscriptions have connotations of costs, ‘Sign up’ does not carry the same burden. However, ‘Subscribe for free’ could imply greater value as something that would normally carry a cost is available to you for free.

Note

Since the call to action is key to converting customers, this is an important element to test. What iterations of your main call to action could you try?

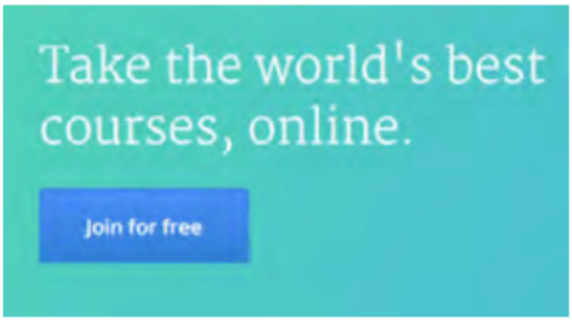


Figure 9.3.3: A Coursera CTA. Good CTAs are short and to the point *Adapted From Screenshot, Coursera, 2016*

Titles and subject lines

Note

The Huffington Post is well known for publishing articles with compelling headlines. Visit www. huffingtonpost.com to have a look at how they grab the reader's attention.

Titles and subject lines often form part of a body of long copy. However, they are important enough to be discussed as stand-alone short copy. Titles and subject lines are there for a very important reason, they tell a reader whether or not they should read further. They are the gateway to your content.

Consider the following titles:

- Guide to online copywriting
- Ten steps to online copywriting that sells.

The second title conveys more information and excitement to the reader, which helps the reader to make a decision to read further.

Subject lines are like headlines for emails, and can make the difference between an email being deleted instantly and being opened and read. As with a headline, which should be carefully crafted like the headline of a newspaper, use the subject line to make it clear what the email is about. For example, if there is a promotion in the email, consider putting it in the subject line as well.

Note

An email subject line is the first cue your audience receives to help them decide whether to open an email or not. How can you make it count?



Figure 9.3.4: A direct, enticing email subject line *Adapted From Screenshot, email*

Titles, headlines and subject lines need to be both persuasive and enticing. Consider what need your copy is meeting for your readers, and express that first. Highlighting a benefit to your readers upfront means they are more likely to engage, even if they don't necessarily need your product or service at the time.

Search adverts

Search adverts have very limited space and time to get a message across and there is plenty of competition for a reader's attention. These few lines of copy need to work hard to ensure a top return on investment. Search adverts typically follow the same basic structure and have strict character limits for each line. The new Google expanded ads are as follows:

> Heading1 – Heading 2 (max. 30 characters each) One description field (max. 80 characters) www.DisplayURL.com (uses your final URL's domain with two optional "path" fields max. 15 characters each).

> **Note**
>
> Read more about this in the Search advertising chapter.

With a limited character count, it can seem daunting to communicate information that entices the right people to click through and also differentiates you from your competition. Testing variations of copy is the best way to determine what works best for your campaign. While copywriters are not generally responsible for writing paid search ads, they are often brand custodians and should review all copy representing a brand.

Social copy

Social media allows brands to have conversations with their customers and fans. This gives consumers a powerful voice and the ability to tell brands what they want. There are a few considerations to keep in mind when creating content for social media.

- **Research is vital.** Understand what type of content community members want. Meaningful and relevant content is more likely to be shared. Hashtags are fairly important for many platforms so research any hashtags you use to avoid making costly mistakes, like DiGiorno did with its use of the #WhyIStayed hashtag. This hashtag was part of an awareness campaign for domestic abuse and was used in tweets explaining why users had chosen to stay in abusive relationships.



Figure 9.3.5: DiGiorno research fail From *Adapted From PoMoFo, n.d.*

- **Remember that it's a conversation.** Your content must be personable and appealing. Use personality and convey the humanity of your brand in order to generate conversation and encourage comments.
- **Write shareable content.** Offer value and be insightful. Ultimately you should aim to create an overall perception that your brand is the thought leader in its industry. Shareable content is credible content.
- **Avoid overly promotional content.** Community members are likely to see right through a sales pitch. Instead, think about how your content can be useful to your reader. Remember, with content, value to the reader should come first, with value to the brand as a secondary consideration.
- **Have a solid communication protocol.** These can be internal guidelines for organisations to follow on how they use and communicate on social media platforms. This also ensures consistency, which is very important for creating a brand personality for readers to engage with.



Figure 9.3.6: Relevant and on-brand social media copy *Adapted From Claire's Digital Marketing Blog, 2016*

Note

All of these points are covered in more detail in the chapters on Social media platforms and Social media strategies.

Long copy

Online copywriting is not just about short, sharp calls to action and attentiongrabbing headlines and adverts. It also covers longer pieces of content.

Longer copy has advantages. Primarily, it allows you to provide more information and encourage the reader to convert. You can foster a relationship with a reader, whether it is on a blog, through email communications, or through articles and news releases. With more words and space available, you are able to build a voice and a personality into your writing.

The expression 'long copy' is somewhat misleading. As online readers behave slightly differently from offline readers, it is unlikely that a skilled copywriter will be called on to create copy for the web that is longer than 800 or 1 000 words per page although, of course, there are exceptions to this.

Long copy needs to be structured and formatted so that it's easy for attentionstarved web readers to digest. Web users tend to scan pages quickly to determine whether or not they will read further. Specifically in longer copy, you need to take this into consideration.

There are many types of long online copy including website copy! Here, we will focus on a few that are useful for marketing:

- News releases
- Articles for online syndication
- Emails
- Blog posts
- Advertorials
- Website.

Bear in mind that this is by no means an exhaustive list.

News releases

News releases are a staple of public relations. As the Internet grows, so does the overlap between PR and marketing. As a result, many copywriters are called upon to write news releases for online distribution as this is a standardised format for

releasing information. Originally intended to provide information for journalists, news releases are increasingly being read by users bypassing the journalists. This means that they should be written in the brand tone, be accessible to the general public, and be optimised and formatted according to the principles of good web writing (more on those later). Also remember to focus on a compelling headline to win over your reader.



Figure 9.3.7: An online press release from Apple *Adapted From Apple, 2016*

Emails

> **Note**
>
> Read more about this in the Direct marketing email and mobile chapter.

Email as a channel is an integral part of many online marketing strategies. Of course, content is a huge part of this; it comprises the words in an email with which a user engages.

By nature, emails are the ideal medium for communicating and building relationships with your consumers. This customer relationship marketing helps to increase retention. Successful email campaigns provide value to their readers. This value may vary from campaign to campaign. Newsletters can offer:

- Humour and entertainment
- Research and insight
- Information and advice
- Promotions and special offers.



Figure 9.3.8: The Litmus updates newsletter *Adapted From Screenshot, DueSouth Escapes newsletter, October 2017*

Blogging

Blogs can be very successful marketing tools. They're an excellent way to communicate with staff, investors, industry members, journalists and prospective customers. Blogging also helps to foster a community around a brand and provides an opportunity to garner immediate feedback. This is an audience made up of players vital to the success of a company which is why it is important to get blogging right. A key consideration is the quality of your headlines. You have to convince your reader to grant you their attention.



Figure 9.3.9: A blog post on the Fast Company blog *Adapted From Screenshot, Fast Company Blog, 2016*

There is plenty to be gained from the process of blogging and obviously, the value, as with email marketing, lies in the content. This communication channel provides an opportunity for you to foster an online identity for your brand as well as giving your company a voice and a personality. This happens through the content you distribute as well as the tone you use to converse with your readers. There is more information on blogging in the chapter on Social media platforms.

Website copy

Website copy is a type of long copy, and the principles that apply to long copy in general also hold true for websites. Digital copywriters need to structure content effectively so that users want to engage with the site and read on. This is especially important when people access a site from their mobile phone, where the small screen size drastically reduces the content users will see before they scroll. Some ways to create digital copy that is usable and appropriate for an online audience include:

- Writing text that can be easily scanned
- Using meaningful headings and sub-headings
- Highlighting or bolding key phrases and words
- Using bulleted lists
- Having a well-organised site.
- **Limiting each paragraph to one main idea or topic.** The leading sentence should give a clear indication of what the paragraph is about. Readers can scan each paragraph without missing any essential information.
- **Cutting the fluff.** Get rid of meaningless turns of phrase and words that unnecessarily bulk up copy.
- **Removing redundancies.** These often creep into writing by accident, but you should work to eliminate them in order to get to the point.
- **Including multimedia wherever relevant.** Some readers may be more partial to video than reading, for example, see http://www.nytimes.com/ projects/2012/snow-fall/#/?part=tunnel-creek.

Writing in the mobile age

Because of the number of people who use the internet via mobile phones, content is usually written for mobile first these days. Here are some points on creating digital copy for all screen sizes that encourages interaction and achieves marketing and business goals.

> Note
>
> Read more about this in the Mobile channels and apps chapter.

- **Get to the point**. With limited screen space, there really is no room for wordy text. You need to determine exactly what your message is and get to the point quickly! This is particularly true for content above the fold.
- **Put the important bits up front**. This includes contact information and navigation links. Word these clearly so that people know what action to take.
- **Condense information to its simplest form**. Ensure that it still makes sense and is grammatically sound.

> Note
>
> Once users have decided to navigate further into your mobile website, you can increase the amount of copy on the pages.

- **Use a call to action upfront**. Mobile web users are goal-orientated so provide them with the next step early on.
- **Use headings and subheadings for scanning**.



Figure 9.3.10: Mobile-optimised copy vs. traditional web copy *Adapted From Mis, 2017*

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9.4: Implementing writing for digital

Apart from the information already covered, writing good copy involves a number of points and best practices that you should keep in mind.

HTML for formatting

HTML stands for HyperText Markup Language and it's the foundation of documents on the web. HTML tags tell browsers how to present content. HTML tags are written in brackets that look like arrows < >.

A good digital copywriter will also be able to use basic HTML to lay out copy knowing that the appearance of the page will get his or her words read. It should be easy for users to skip and skim the copy and it should be easy for them to find the parts that are most relevant to them.

When writing online copy you can use an HTML editor where you insert the tags yourself or, a 'What You See Is What You Get' (WYSIWYG) editor, which works in a similar way to a word processor.

Basic HTML is not difficult to use, and will help you format your content. Here are some basic HTML tags:

To bold: **phrase you want to bold**

To italicise: *phrase you want to italicise*

To underline: phrase you want to underline

To list:

lines you want to list

To create a paragraph:

paragraph text

To inert a line break:

To insert a link: phrase you want to link

To insert a heading:

Level one heading

To insert a sub-heading:

Level two heading

The tags also help search engines to identify how the content has been laid out on the page.

The best way to get to grips with HTML is to start using it online, where you can see first-hand how the tags work.

> **Note**
>
> Right click on any web page and click 'view source'. Can you find the paragraph tab

?

SEO copywriting

A good online copywriter will have a thorough understanding of SEO and how this can be integrated into his or her writing. Key phrases can be used in long and short copy alike, to great effect.

Optimising for human and machine users

One of the most notable differences between writing for print and writing for digital is that when it comes to the latter, you are writing not only for an audience, but also for the search engines. While your human audience should always be your first priority, your copy also needs to speak to the search engines in a language they can understand. This digital tactic has been covered in greater depth in the chapter on Search engine optimisation. Optimising your copy for search engines is important because your target audience is most likely to be using a search engine to find the products or services you are offering. If the search engine is not aware that your content can give users the answers they are looking for on a particular subject, it won't send traffic to your website.

> **Note**
>
> Read more about this in the Search engine optimisation chapter

Optimising your content for search is the process of telling search engines what content you are publishing. Keywords, key phrases, and themed pages are an integral part of this. Google is becoming increasingly semantically aware and can recognise synonyms, so repeatedly using specific keywords is no longer important; instead, good SEO copy focuses a page around particular themes, using keywords relevant to those themes.

SEO copywriters need to know how to blend keywords into their content and how to use them in conjunction with text formatting and metadata. In addition to assisting you with structuring your content, these tags indicate relevance and context to search engines. Some of the tags are used by screen readers, and so they assist visitors with technical limitations to access your content. The meta description can also be used by search engines on the search engine results pages (SERPs).

Key phrase

A keyword refers to a single word used in a search query, while a key phrase refers to more than one word used in the search query.

Key phrase research is an important element of digital copywriting, and is covered in detail in the chapter on SEO. Having identified the themes of your web pages, keyword research should be used to identify what phrases your target audience use when searching for you. It is important to know what people are searching for, so that you can provide what they need.

> **Note**
>
> Read more about this in the Search engine optimisation chapter

Once you have a good idea of the words people are using to find information online (online tools exist that will guide you in this), you can create pages themed around the use of these phrases and their synonyms. A good copywriter is able to create these themed pages and use keywords/synonyms seamlessly, so that the reader cannot detect that they have been included.

Key phrases can be integrated into nearly every type of content that you write for the web. Below are a few places where Red & Yellow tend to include key phrases and synonyms on our website.

Page title

The page title appears at the top of a user's browser and should be able to tell the user (and the search engine spiders, of course) what the main theme of the page is. The page title is usually limited to under 60 characters, including spaces. The key phrase should be used as close to the beginning of the title as possible, followed by the name of the company or website.

Page URL

The main key phrase for the page should be used whenever possible in the URL for the page. If you are using a blogging tool or content management system (CMS), the URL is generated from the page title, so using the key phrase in the page title should ensure that it is in the URL as well.



Figure 9.4.1: The Red & Yellow School home page URL *Adapted From Screenshot, Google search, 2017*

Meta description

The meta description is a short paragraph describing the page content. This summary is usually shown on the SERPs if it contains the search term, which means that it needs to entice users to click through with a strong CTA. The spiders use the meta description to deduce the topic of the page, so using targeted key phrases is important here. Copy should generally be between 150 and 160 characters, including spaces.

> **Note**
>
> Every page on a website must have a unique URL, page title and meta description.

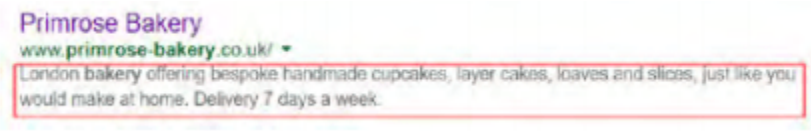


Figure 9.4.2: Example of a meta description *Adapted From Screenshot, Google search, 2017*

Meta keywords

Meta keywords are the list of the words and phrases that are important on a web page. Using targeted key phrases is important, but remember, no keyword stuffing! The meta keywords are limited to 200 characters, including spaces. This is, however, no longer a major source of information used by search engines though it certainly doesn't hurt to include these.

Headings and sub-headings

Spiders assign more relevance to the text used in headings, so it is important to use your key phrases in the headings on your page. It also helps you to structure your content. Headings are created with HTML tags. Heading structures are set out like this:

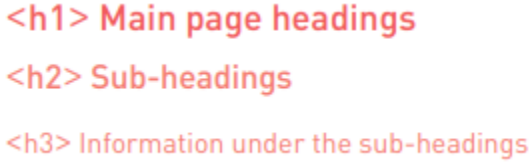


Figure 9.4.3: Heading structures *Adapted From Stokes, 2013*

Having a good heading hierarchy is important as spiders use it to move through your page and understand its relevance to the search query; it also helps human readers to scan your page.

On-page copy

For on-page copy, remember that you will be optimising for a theme rather than for a set key phrase. This means you want to use relevant synonyms as well as your keywords without being overt about it meaning they should not stand out too much.

For SEO effectiveness, a page of web copy should be at least 250 words long. On this page, use keywords and synonyms that fit the theme as and when required.

The page should not be so long that the user needs to scroll continuously to get to the end of it. If you find the page is getting exceptionally long, consider breaking it into different web pages for different sections. In this way, you could add several pages of optimised copy focused on one theme instead of one very long page. This will benefit your reader if they are looking for something that is particular to the shorter page.

Links to your optimised page

The text used to link from one page to another is considered important by search engine spiders, so try to ensure that your key phrase is used when linking to the optimised page. The anchor text of links should include the key phrase of the page being linked to, and not the page being linked from.

Note

When submitting promotional copy to other sites that includes links back to your own website, which phrases would be most important to include in this link text?



Figure 9.4.4: Links on a Google Support page dealing with Google Quality *Adapted From Score Screenshot, Google support for Adwords, 2017*

Images: Alt text and title tags

Alt text refers to the 'alt' attribute for the HTML tag: this is the text that appears in the caption. It is used in HTML to attribute text to an image on a web page, normally to describe what an image is about and display text in instances where the image is unable to load. While this is handy for humans and aids accessibility, it is also used for another reason, namely, search engine spiders can't read images, but they can read the alt text. The image title tag shows when you hover with your mouse over an image, depending on your browser, and can also be read by the search engine spider. This will also help users find your images on Google's Image Search, which can also be helpful in driving traffic to your page.

Best practices for online copywriting

Now that we have covered the basic theoretical principles of writing for digital, we need to look at the best practices to apply whenever you are writing copy for publication on the web. There are several things that you need to consider.

1. Does your copy convey a creative idea?
2. Does the layout of your copy make it easier to read?
3. Is your meaning clear and direct?
4. Does the copy convey the features and benefits necessary to make your point (if applicable)?
5. Will your readers clearly understand the content of your writing?
6. Is the content of your message structured in a logical manner for desktop and/or mobile reading?

The rest of this chapter will be dedicated to ensuring that you have the knowledge and tools to answer these questions.

Conceptual copywriting

Most of the points in this chapter have focused on the practicalities of writing online copy such as getting information across and encouraging user actions and engagement.

Copy should also be creative, beautiful and thought provoking.

Your copy should express an idea that grips readers. Conceptual copywriting is about making an idea memorable merely by using words to express it. The idea is central, and the words are the vehicles that convey it. Clever wording, smart ideas and thoughtful copy should make the reader pause, think, and want to engage more deeply with your idea.

While images are often used to express powerful ideas, words can be just as effective. Consider this famous example, which demonstrates how a small change in the copy can radically affect one's perception of an idea:

A woman without her man is nothing.

A woman: without her, man is nothing.

Writing conceptually means conveying a brand message in a creative way to make an emotive connection with a specific audience. It's all about bringing a big idea or concept to life.

Layout and legibility

As we have mentioned already, readers process content differently online from the way that they read offline. On the web, readers tend to scan text rather than read every word.

As a result, online copy is judged at a glance, not just on content, but first and foremost by its layout. It needs to look as if it's easy to read before a user will choose to read it. Digital copy should be easy to scan. This means using:

- Clear and concise headings
- Bulleted and numbered lists
- Short paragraphs
- Bold and italics
- Descriptive links.

It's easy to see this in practice.

Before	After

Tea has been drunk for thousands of years, and as people are growing more health conscious, tea sales are increasing. Personal preference plays an important role in making the perfect cup of tea. However, using fresh water ensures maximum oxygen in the tea, and warming the teapot first is standard practice. Tradition dictates one teabag per person, and one for the pot. Tea is served with milk, lemon, honey or sugar, according to taste.	Worldwide, **tea sales are increasing** as people are becoming more health conscious. Here are some tips on making the **perfect cup of tea**: • Use fresh water (for maximum oxygen) • Warm the teapot first • Use one teabag per person, and one for the pot The perfect cup of tea is based on **personal preference and taste**. Tea can be served with: Milk or lemon Honey or sugar

Language

The basic principles of good writing apply online, but because your audience's attention is limited and often divided, it is best to keep it simple and tailor your language to your audience.

Tone: The tone of your content should be consistent with the brand for which you are writing. Brands will often have full tone-of-voice documentation. If they don't, read some of the brand material to get a feel for the company's style of communication. Compare the difference in tone in the examples below.

Example 9.4.1 of Tone A: Investec

We provide a diverse range of financial products and services to a niche client base in three principal markets, the United Kingdom, South Africa and Australia, as well as certain other geographies.

Investec's strategic goals are motivated by the desire to develop an efficient and integrated business on an international scale through the active pursuit of clearly established core competencies in the group's principal business areas (Investec, 2016).

Example 9.4.2 of Tone B: Nando's

The story of Nando's starts hundreds of years ago with the first Portuguese explorers who set sail for the East in search of the legendary spice route.

Lured by the promises of our beautiful continent, they came ashore and there, under our famous sun, they discovered the African Bird's Eye Chilli or as we know it (and love it), PERi-PERi. Unique in its properties, they used it to create a one-of-a-kind sauce that ignited the fires of passion inside them.

A few centuries later, in 1987, it was the same PERi-PERi sauce that inspired Fernando Duarte to invite his buddy Robbie Brozin to a small Portuguese eatery in Rosettenville, South Africa, to try some PERi-PERi marinated chicken. In his own words, "I knew nothing about the food business, I just knew that it was the best chicken I had ever tasted." (Nando's, 2016).

Active voice: Grammatically speaking, people expect characters to execute actions that have an impact on objects or other characters.

For example: The girl ate a chocolate.

- The girl is the subject.
- Eating is the action
- The chocolate is the object that is affected by the action

This is known as the active voice. Unfortunately, writers often use the passive voice. This turns the object into the subject forcing the reader to think more carefully about the sentence. For example: The chocolate was eaten by the girl. The human brain automatically translates this into the format that it expects. According to Price and Price, this adds 25% to the time required to understand a sentence (Price & Price, 2002).

When writing for the web, it is better to use the active voice.

Neologisms and buzzwords: Sometimes the World Wide Web is referred to as the Wild Wild Web as it is an environment where anything goes. The ever-growing numbers of social media participants, for example, habitually play fast and loose with grammar.

With new services and products being developed daily, it can feel as if the list of new words, and their uses, is growing faster than you can keep up with. Dictionaries and reference guides celebrate this regularly with a 'word of the year', usually one that has been in heavy use on the Internet for the three years preceding its entry into a dictionary.

For example, in 2015, the laughing emoji was voted word of the year by the editors of the New Oxford American dictionary to reflect the worldwide increase in popularity of the emoji (Oxford Dictionaries, 2015).



Figure 9.4.5: The Oxford Dictionaries Word of the Year, 2015 *Adapted From Telegraph UK, 2015*

Online services can quickly become verbs in everyday language, so we say 'Googling something' instead of 'searching on Google', and of 'Facebooking someone'. Bing is still trying desperately to work its way into everyday conversation in this way.

Always remember you are writing for your users so talk in the same way that they talk. If your content is aimed at cutting-edge early adopters, then pepper it with the latest buzzwords. If your audience does not know the difference between Chrome, Safari, and Microsoft Edge, then be cautious when using a word that did not exist the day before.

Features and benefits: Writing compelling copy means conveying to readers why they should perform an action. While features may seem all-important, you need to communicate the benefits of the features to the user.

You also need to communicate the benefits in a way that makes the user think about the product's role in their life. Write so that they imagine actually owning the product.

- **Feature:** a prominent aspect of a product or service that can provide benefit to users. It describes what the product does.
- **Benefit:** the positive outcome for a user that a feature provides. It can be the emotional component of what the user gets out of the product.

> Why would your audience want to buy your product or service? Put aside the features for a moment; what will compel your audience to buy on an emotional level? How does it address their wants and needs?

For example, consider a home entertainment system. Features could include surround sound and a large flat-screen television. The benefit is a cinema-quality experience in your own home.

Features and benefits are very different. Features are important to the company that provides the product or service. Benefits are

important to those who decide to use the product or service.

Persuasive writing makes use of features, benefits and active verbs to create appealing messages for your personas:

Enjoy cinema-quality movie nights in your own home with a surround-sound home entertainment system.

Logic

The structure of online copy can be compared closely to the structure of a newspaper article. The headline, usually containing the most important bit of information in a story, comes first. Online, visitors decide quickly whether or not to read a page. As a result of this, the most important information needs to be at the top.

Start with the summary or conclusion which is the main idea of the article.

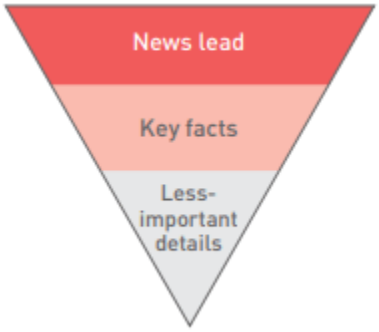


Figure 9.4.6: Information hierarchy *Adapted From Stokes, 2013*

While clever word play in headings can attract some attention, these need to be written in line with the objective you want to achieve. The copy is multitasking, not only is it informing visitors of what to expect; it is also telling search engine spiders what the page is about.

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9.5: Advantages and challenges

The advantages of good digital copywriting are simple, your content will work better, your SEO will benefit, and your customers will find it easier to absorb your material. Clear call to actions can also help to increase response rates.

However, some challenges do exist. The primary challenge is learning what, exactly, good copy is. This is important because bad copy can really turn off your customer! Meeting SEO requirements without being spammy can be tricky, and you need a clear set of writing guidelines for your organisation to follow.

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9.6: Measuring Success

Measuring copywriting performance is important. How will you know what's working and what isn't unless you do so?

Often, brands use conversions as the primary way to measure success. If your copy doesn't convert, what's the point? The goals that you measure will depend on the goals of your copy. If you want to boost subscribers to your newsletter or blog, then the number of subscribers will be your measure of success. If you want to increase sales, then the number of sales will be your measure. Because digital copywriting applies to almost every aspect of digital marketing, you can only measure its success if you have a clear idea of your goals.

However, copy isn't always just about converting. You can also use impressions, time on page, and bounce rate to see whether your copy is keeping people interested and on-site.

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9.8: Tools of the trade

The Simple Measure of Gobbledygook (SMOG) formula from Harry McLaughlin can be used to calculate the reading level of copy that you have written. A SMOG calculator, and instructions for use, can be found on here: www.readabilityformulas. com/free-readability-formula-tests.php

Alternatively, www.flesh.sourceforge.net offers a Java application that produces the Flesch-Kincaid Grade Level and the Flesch Reading Ease Score of a document.

For an online dictionary and an online thesaurus, you can visit www.dictionary.com and www.thesaurus.com.

> **Note**
>
> Read more about this in the Search engine optimisation chapter.

When it comes to keyword research there are a host of tools available. Have a look at the tools suggested in the chapter on SEO. Grammarly is a good one - www. grammarly.com.

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9.9: Case study - Yelp

One-line summary

A Yelp salesperson tripled her B2B email marketing response rate by personalising and humanising email copy.

The challenge

Yelp's sales email templates were dry and unengaging, not considering the audience to whom they were writing and included no consideration of features vs. benefits. This caused a disconnect between the brand and its audience. The emails made the salesforce sound, "Like a bunch of robots... with no personality" (Medhora, 2015)

The solution

One Yelp salesperson tested a number of more personalised emails and came up with a formula that increased response rates considerably. She focused on showing that she was a real person and on building a sense of urgency, and her formula looked like this:

Feature + Benefit + Value + Human Factor = Email more likely to earn a response

So, for example, for the feature, she would link to a business's Yelp pages. The benefit would be a description of how the business can grow through Yelp. The value would be indicating how many leads the business had found through Yelp, and the human factor involved casual subject lines and use of emojis. The subject line for the email below was "Re: Yelp Email Per Your Request – A Response Would Be Appreciated☺.

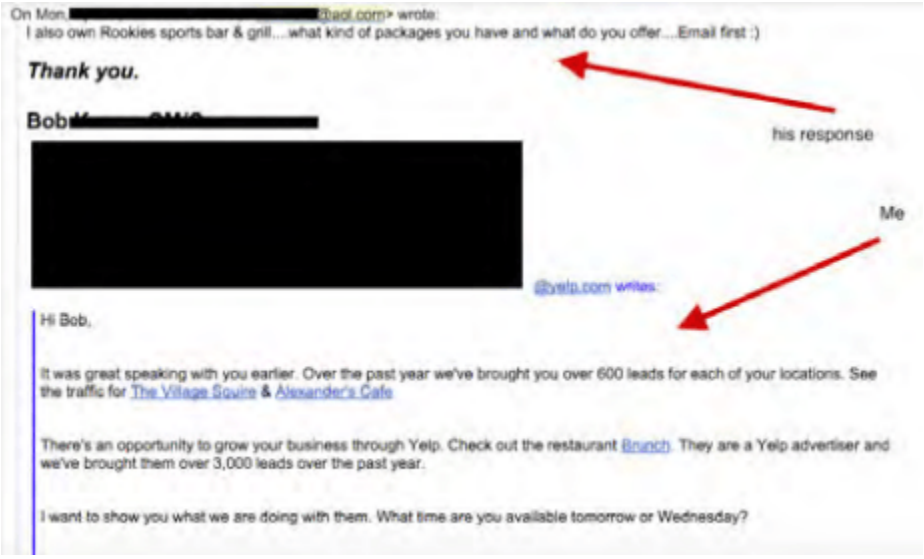


Figure 9.9.1: A personalised Yelp email and its response *Adapted From Kopywriting Kourse, 2015*

The salesperson ran a few experiments to measure the success rates of personalised emails against Yelp template emails, added some important factors to consider – how the copy attracted attention, ignited interest and desire, and encouraged action – and then made sure that the email was interesting as well. She also tested a number of headlines, or subject lines, to see which had the best response rates.

The results

- Her response rate rose from 3.33% to 11.43% (even if some of the responses were negative!)
- She learned some important lessons about how personalising your copy, thinking about features vs. benefits, and writing for an audience of one can improve responses!

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9.10: The bigger picture

It should be pretty clear by now that online copy touches every other digital marketing tactic. After all, they all need to communicate messages in text format, whether that's a CTA button on a website, a video description, or a long-form press release written for digital PR purposes. While content marketing strategy may tell you what content to create, knowing how to create it comes down to great web writing skills.

Writing for digital overlaps strongly with SEO, since copy is the basis of all web optimisation as search engines can't read images, videos or other rich media content, and with UX, since making a website easy to navigate involves ensuring that your copy matches user needs.

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9.E: Digital copywriting(Exercises)

Case study questions

1. Why would bad copy in emails prevent users from signing up with Yelp, which aims to help businesses grow?
2. Why do you think the more targeted copy performed better than the more generic copy?
3. Identify the writing for digital principles (including audience considerations) that improved the response rate for the Yelp emails.

Chapter questions

1. Why is important to write for an 'audience of one'?
2. Why should users dictate your content? List some ways that users' needs determine content.
3. What are some ways to make web copy easy to read and why is it important to do so?
4. For some real online copywriting practice, choose an article in a magazine or newspaper and rewrite it for an Internet audience.

Further reading

To get started on writing for digital, Hot Text: Web Writing That Works is an easy-to-read and thorough resource. The website for the book is www.webwritingthatworks.com. Another excellent resource is The Idea Writers: Copywriting in a New Media and Marketing Era (www.palgrave.com/gp/ book/9780230613881) www.copyblogger.com has regular articles and case studies on writing online copy that converts.

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9.S: Writing for Digital(Summary)

Online copy is the foundation of a website. It is constantly in view and is usually the focal point of a page. Good online copy can also make the difference between a site attracting regular traffic and becoming stagnant.

Your writing needs first and foremost to have the reader in mind. The copy should be strong, clear and easily readable (remember the principles of scannability, including bullet points, bolding, short paragraphs and headings), while still making maximum use of key phrases.

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10: CREATE - ECOMMERCE

Learning Objectives

In this chapter, you will learn:

- the various types of eCommerce.
- eCommerce on specific channels like mobile and social.
- eCommerce across multiple channels.
- the various considerations in setting up an eCommerce site.

10.1: Introduction

10.2: Key terms and concepts

10.3: Types of eCommerce

10.4: eCommerce on specific channels

10.5: Multi-channel commerce to total retail

10.6: Setting up an eCommerce site

10.7: The bigger picture

10.8: References

10.9: Tools of the trade

10.10: Advantages and challenges

10.11: Case study - Pixie Faire

10.E: eCommerce(Exercises)

10.S: eCommerce(Summary)

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10.1: Introduction

While credit cards and online shopping (shoes anyone?) are often associated with the term eCommerce, the field encapsulates all digital transactions. This includes the buying and selling of goods and services and the transfer of funds and data.

Due to the global recession, the retail industry as a whole has seen slow growth over the last few years. That there is any growth at all is largely due to eCommerce, with many US retailers recording flat or declining sales without their online channels (PwC, 2017). eCommerce is a trillion dollar growing industry. It is recorded as the only trillion dollar industry that continues to grow by double digit percentages each year, rising 24% in 2016 and such growth is expected to continue to 2020 (eMarketer, 2016).

The explosive growth of eCommerce in recent years can be attributed to the ever increasing reach of the Internet, the development of faster internet speeds and the convenience afforded by ordering things online. Hunting and comparing prices from the comfort of your chair is often more enticing than going from store to store.

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10.2: Key terms and concepts

Table 10.2.1

Term	Definition
eCommerce	The buying and selling of products and services, including funds and data, electronically.
B2C	Business to consumer, where a business sells products or services directly to the consumer.
B2B	Business to business, where a business sells products or services to another business, such as the relationship between manufacturers and distributors or retailers.
C2C	Consumer to consumer, where consumers sell products directly to other consumers.
C2B	Consumer to business, where consumers sell products to business, such as freelance services.
Cross channel commerce	Strategic maximization of customer relationships beyond the initial engagement channel.
m-commerce	Mobile commerce, the use of wireless devices to conduct commercial transaction online.
Multi-channel commerce	An online purchase experience that involves multiple channels, such as social media, company website, user reviews, in-store, traditional media and apps.
Omnichannel	Retailing strategy that delivers a seamless customer experience through all available shopping channels.
Payment gateway	eCommerce service that processes online payment for purchases through online stores.
Social commerce	Subset of eCommerce that involves social media and online media that supports social interaction, where user contributions assist in online trade of products.

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10.3: Types of eCommerce

Electronic Commerce, or eCommerce, is defined as the buying and selling of products and services, including funds and data, electronically. eCommerce can be divided into 4 main types.

Business to consumer B2C

The most common type of eCommerce is **business to consumer (B2C)**, in which a business sells products or services directly to consumers over the Internet. All retail sites are essentially B2C, with amazon.com as the prime example, due to it being the world's largest online retailer.



Figure 10.3.1: The amazon.com homepage is an example of B2C eCommerce *Adapted From Screenshot, Amazon, 2017*

The benefits of eCommerce include the ability for retailers to have a wide variety of products available without needing the physical retail space to hold and display items. The procurement and distribution processes are also streamlined as products are shipped directly to consumers, and not via distributors or retail outlets in between. The process has fewer overheads, and is more efficient in terms of time and money, reducing inventory management costs, and ultimately being able to deliver products to the customer at less cost than retail in-store outlets.

Business to business

B2B Another type of eCommerce is **business to business (B2B)**, which describes online transactions between businesses, such as between a manufacturer and a wholesaler, or between a wholesaler and a retailer. It can also include business related services, such as letting of commercial spaces, printing services, outsourced marketing, hiring and selling of office equipment, and so on.

Like B2C, the same benefits of lowered inventory management costs and a more streamlined procurement and distribution process, make eCommerce an efficient and attractive model for companies selling to other businesses.

Consumer to consumer C2C

Consumer to consumer (C2C) eCommerce is where consumers sell products to other consumers. Generally, a C2C business provides the platform for various users to use it to interact with each other for mutual benefit. A recent large-scale C2C eCommerce example is Uber. The business simply provides a transactional platform where consumers offer other consumers a lifting service based on location and cost preference. eBay is another globally recognised C2C online business. Sellers can list their products on eBay and interested buyers auction for it. Similar sites such as Airbnb, Gumtree and Craigslist are all C2C eCommerce platforms.

In C2C eCommerce, consumers either pay a fee to use the platform or the platform takes a percentage of all transactions processed through the site. If the platform is free to all consumers to buy and sell, then the site often generates its revenue through advertising.

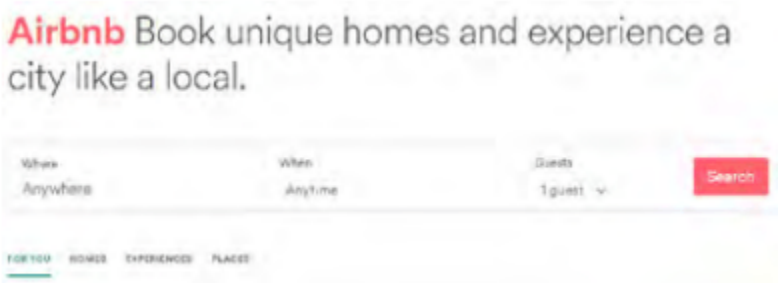


Figure 10.3.2: Airbnb is a platform that facilitates C2C services *Adapted From Screenshot, Airbnb, 2017*

Consumer to business C2B

Consumer to business (C2B) eCommerce involves consumers selling products or services to businesses and the business pays the consumer. Examples of this include Guru.com, a freelancer hiring website and websites that pay individuals for completing online surveys.

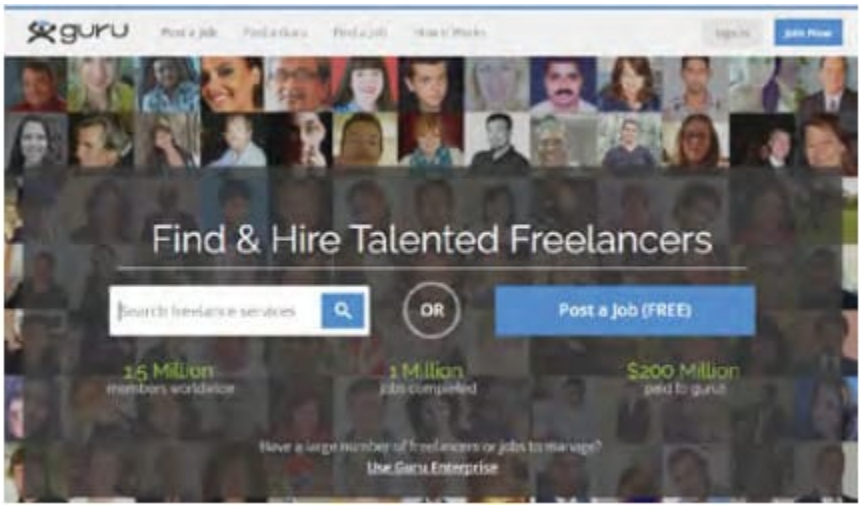


Figure 10.3.3: The guru.com homepage *Adapted From Screenshot, The guru.com, 2017*

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10.4: eCommerce on specific channels

eCommerce refers to electronic business transactions across the entire Internet. There are some specific channels on which eCommerce is gaining popularity, namely mobile and social commerce.

With mobile becoming the channel of choice for accessing the web and with Facebook, along with other social media platforms, continuing to dominate the time users spend online, businesses need to ensure they operate in these spaces if they want to continue to appeal to, and retain, their users.

In short, having eCommerce that operates across mobile and social is an online business necessity. Failure to move into these spaces means users may simply look for alternatives that do facilitate eCommerce through these channels.

Mobile commerce (m-commerce)

Mobile commerce (m-commerce) is the use of wireless handheld devices such as cellular/mobile phones to conduct commercial transactions online. While the growth of desktop eCommerce has slowed down, mobile continues to thrive, with dramatic year on year increases. Over a third of all eCommerce transactions now take place on mobile devices, and this is expected to grow by another 30% in 2017 to overtake desktop transactions. While in China, mobile shoppers already account for 68% of online purchases (SmartInsights, 2017). The importance of m-commerce is undeniable and should be included in every business' eCommerce strategy.

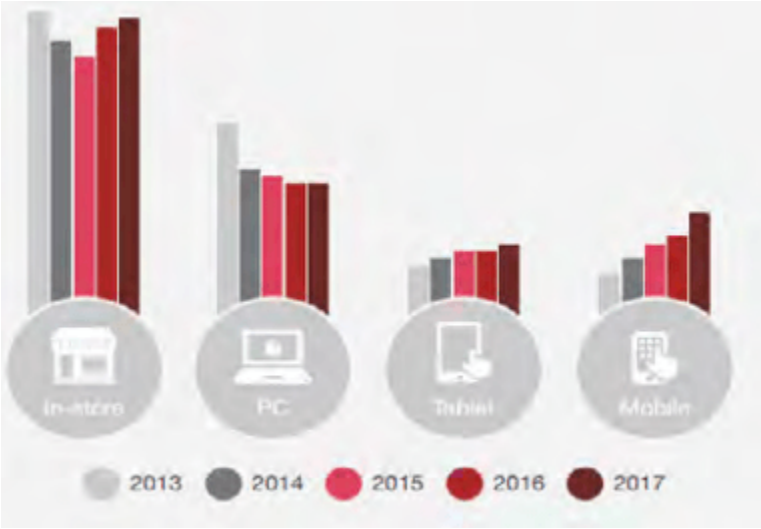


Figure 10.4.1: Usage of shopping channels over time *Adapted From PWC, 2017*

Reasons for growth in m-commerce

M-commerce transactions continue to grow as a result of the following:

- The **number of global mobile users is steadily increasing** every year, resulting in an increased demand for mobile websites and applications.
- The **rapid adoption of eCommerce** means that evolving customers are looking for more options across more devices.
- **Improved technology** has given mobile devices advanced capabilities and faster internet access enabling m-commerce to be available on even the most affordable devices.
- **Broadband technology** and **lowering data costs** mean more consumers have access to m-commerce even on affordable devices and data plans.
- Mobile users are looking for **instant gratification** online; this includes their online shopping needs. Increase in m-commerce for fast food, fresh produce and basic household items such as toilet paper, nappies, bread and eggs have been driven by this need for customers to get what they need when and where they want it.

Benefits of m-commerce

M-commerce has a range of benefits over traditional eCommerce. These include:

- **Access**

Gaining access to the Internet through mobile is easier and more affordable than desktop options. The lfalling costs of data and improved Internet access on mobile mean more and more users have access to the Internet via mobile than any other device.

- **Convenience**

Mobile phones are always with us and being constantly connected enhances the benefits of anytime, anywhere use with no need to plug in to or log in to computers wherever they are situated. Mobile is an appropriate name as these devices are with us wherever we go, making it easy and convenient to transact online at any time convenient to the consumer.

- **Costs**

Mobile devices are more affordable than computers and offer multiple uses reducing the need for an additional computer. Calls, messaging services, social media and news content are just a few of the reasons consumers would prefer to use a single device making mobile phones the obvious choice.

- **Ease of use**

Mobile phones are relatively easy and simple to use, and there is no need for a particularly digitally skilled consumer. They allow consumers to make instant purchases with little technical skill.

- **Mobile payments**

Security around online payments remains the biggest barrier to eCommerce. Mobile payments allow alternative options for transactions via mobile currencies, mobile wallets and alternative mobile only payment methods. Such easy and secure payment options make mobile the preferred choice for many users.

- **Rich content**

The advances in mobile processing power and cheaper data rates mean GIFs and videos can be easily used on mobile web and mobile applications (apps). Such rich media allows brands to better demonstrate a product's key features, to share testimonials of happy consumers, and to showcase the use/look of the product or service.

Mobile web vs. Mobile applications for m-commerce

Google is the largest search engine used by mobile consumers globally, and thus access to m-commerce sites is mostly via Google search. Email marketing, and social media are the next largest drivers to m-commerce platforms, also via mobile browsers. As a result, traffic and transactions on mobile browsers outperform traffic and transactions on apps.

However, this does not mean that mobile apps are not important. Just because most traffic is through mobile browsers, doesn't mean that your business cannot operate mainly through the app. Mobile applications should be considered, and if applicable for your business, used in conjunction with mobile websites to enhance consumers' overall shopping experience. If most of your mobile traffic is through apps, then you will need to consider using the app as your primary m-commerce platform.

> Note
>
> If you want to learn more about whether a mobile app or mobile website is better for your business go to Human Service Solution at www. hswsolutions.com/ services/mobile-webdevelopment/mobilewebsite-vs-apps/

Social commerce (s-commerce)

Social commerce is a subset of eCommerce that involves social media, or other online media that supports social interaction, and user contributions, to assist users with the online buying and selling of products and services. S-commerce uses social networks to facilitate eCommerce transactions – it brings eCommerce functionality directly into social media platforms. And with users increasingly spending their online time in these social media spaces, bringing eCommerce to where users are spending most of their time makes good business sense.



Figure 10.4.2: Social media captures 30% of online time *Adapted From Global Web index, 2016*

When customers are satisfied with your business, social media makes it easy for them to share and recommend your brand. Because of this shareable nature, social media is a place where content goes viral. This is known as social influence. Social media channels play a very important role in driving conversions if you have happy customers, but such channels can also cause brand degradation if a customer is unhappy.

Social media enables conversations to spread at lightning speed so how you will harness these conversations to drive sales needs to be considered as part of any eCommerce strategy. Enabling users to purchase the products and services that are being talked about and shared on social media is the most effective of way of using the platform to drive conversions. Various platforms now enable users to buy products directly and instantly through the platform.

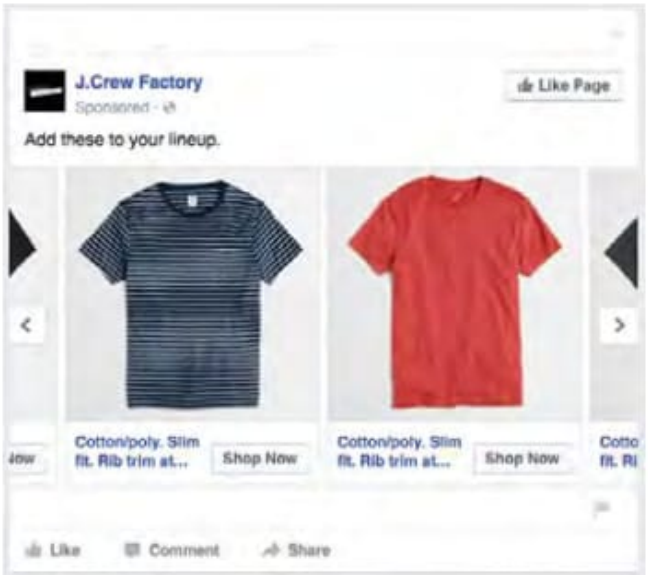


Figure 10.4.3: Shopping on Facebook using the 'Shop Now' button *Adapted From Social media examiner, 2017*

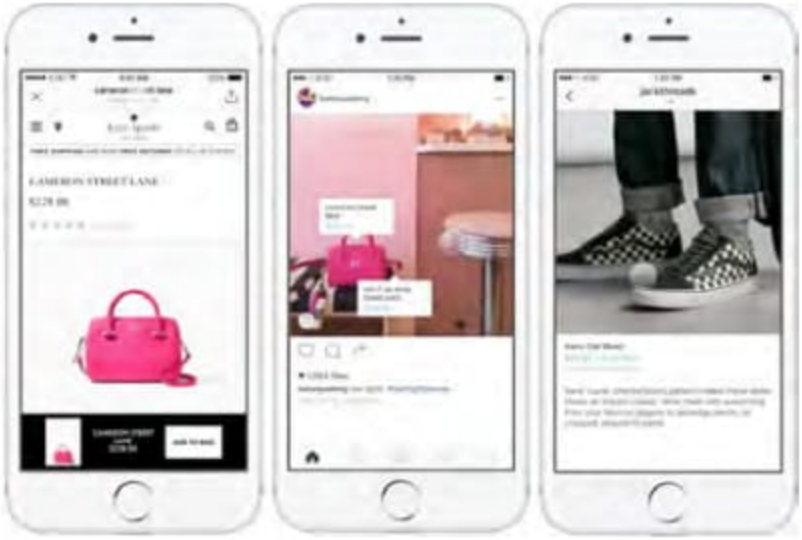


Figure 10.4.4: Shopping on Instagram. Users can purchase highlighted items directly *Adapted From Getsidecar, 2017*



Figure 10.4.5: Buyable Pins on Pinterest *Adapted From Demandware, 2017*

To find out more on using Facebook for s-commerce go here:

https://www.facebook.com/business/in...-and-eCommerce and about Buyable Pins on Pinterest go here. www.demandware.com/pages/pinterest

Benefits of s-commerce

Just like m-commerce, there are certain benefits that s-commerce has over traditional eCommerce. These include:

- **Audience growth**

As of January 2017, over 2.7 billion people were on social media. This is more than a third of the global population. This number is also up over 20% from 2016. A tremendous growth, with little sign of slowing down (Chaffey, 2017). One of the most important considerations for any eCommerce business is how to reach and sell to its target customer audience, and from these statistics it is safe to say that a large proportion of any brand's market is on social media.

- **Higher search engine ranking**

Using social media for s-commerce increases traffic to your website which will influence your ranking on search engine results. Sharing links to products and content on your website through social media is an excellent way to drive traffic using social media users. It also allows your audience to engage with a product, like or share it, and to reach an even larger audience.

- **Authentic engagement and traffic**

The most significant benefit of using social media for s-commerce is the engagement and reach that businesses can get whenever they share content. By appearing in followers' updates or feeds on a regular basis, you're participating in a powerful branding opportunity. Users who have regular positive contact with a company are more likely to recommend that company.

Operating on social media encourages users to connect with a business through two-way communication. This allows customers to not only engage with your business on a commercial level, but it also gives them the opportunity to use social media as an efficient customer service channel where it's possible to solve problems. Social media word-of-mouth (sharing/ reposting) helps with audience building, as well as increased engagement and website traffic.

- **Customer loyalty**

S-commerce is not purely focused on selling but uses the social platforms to help the business build relationships with potential and existing customers. Such relationships can deepen trust and loyalty between consumers and the brand. This in turn creates happy, satisfied customers, who will likely be customers who make repeat purchases, i.e. a loyal customer.

- **Analytics**

Social media platforms make it easy to track, measure and evaluate conversions that happen through s-commerce. Facebook, Twitter, Instagram, Pinterest and LinkedIn all offer built-in analytics tools for measuring traffic, clickthrough, fans/followers, likes, sentiment and actual conversions coming via the social platform. This is a huge benefit for monitoring your ROI.

Learn more about social media as a digital marketing tactic in the Social media platforms and Social media advertising chapters.

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10.5: Multi-channel commerce to total retail

In addition to being available on specific channels, eCommerce also forms part of other retail approaches. It is important to understand what these approaches are and where eCommerce fits into the broader strategy of your business.

Multi-channel commerce

When your business operates across multiple sales and media channels, you are considered to be engaging in multi-channel commerce. For instance, you might sell your products on your website, a mobile app, via a call centre, in stores, on Amazon and on eBay, all while communicating with customers via many types of devices and social media channels. You utilize a variety of multiple sales and marketing channels to sell your products to different types of users and, therefore, you're a multi-channel vendor.



Figure 10.5.1: Multi-channel means operating across multiple channels to reach different customers *Adapted From Liquid-state, 2016*

Cross-channel commerce

When your business encourages its customers to interact with your business on more than one channel, you are engaging in cross-channel commerce. Essentially cross-channel commerce is the strategic maximization of customer relationships via the introduction of new channels beyond the one that originally engaged the user.

A customer would have approached a brand via a specific channel to browse and initiate purchase, and cross-channel retailers would encourage that customer to then make use of other available shopping channels, such as the website, app or social media platforms, to engage further with the brand. Cross-channel retailers encourage interactions on their terms. Such interaction across channels increases the likeliness of additional conversions and future sales.

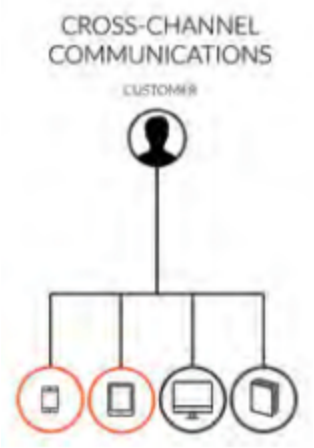


Figure 10.5.2: Cross-channel commerce is directing the same customer to engage with your business on more than one channel *Adapted From Liquid-state, 2016*

Omnichannel commerce

An omnichannel commerce strategy can be defined as a retailing strategy that delivers a seamless customer experience through all available shopping channels. What distinguishes the omnichannel customer experience from the multi-channel customer experience is that with the latter there is true integration between channels on the back end including customer data (single view of customer), inventory management, stock movement, supply-chain, fulfilment information and customer relationship management.

The customer's interaction with the brand is integrated across all channels. Customers can seamlessly migrate from channel to channel with no interruption or loss of data, and can pick up wherever in their customer journey they may be irrespective of which channel they choose to engage the brand.

Customers are becoming increasingly digitally savvy, and expect to be able to engage with the brand across a variety of channels, depending on what is most convenient to them. They expect these interactions to be seamless, backed by an integrated system across all channels. In short, customers expect an omnichannel commerce experience, and are frustrated by what they see as inferior brands, that fail to provide this.



Figure 10.5.3: Omnichannel commerce means providing a seamless customer experience by integrating interaction across all available channels *Adapted From Liquid-state, 2016*

Note

Further Reading: 7 Inspiring Examples of Omnichannel User Experiences by Aaron Agius: blog.hubspot. com/marketing/omni-channel-userexperience-examples#s m.00001gxdf8f6orey1z5 ftxme7hlbh

Total retail

A seamless experience across all channels should arguably be a point of parity, rather than a differentiator. With thousands of brands competing for business, there is a need to go one better than omnichannel and offer their customers an enhanced and personalised online shopping experience if they want to satisfy and retain their customers. In 2014, PwC termed this approach of providing a seamless, enhanced and personal retail experience as going, "Total retail" (PwC, 2014).

Total retail means two things:

1. A unified brand story across all channels that promises a consistently superior customer experience.
2. An integrated back office operating model with agile and innovative technology.



Figure 10.5.4: Total retail offers a customer-centred retail experience, delivered seamlessly across all channels *Adapted From Liquid-state, 2016*

Total retail is a more customer centric approach than omni-channel. It still offers a seamless experience to the user across channels, but it places the individual customer's experience at the heart of all its business operations. The focus is on the customer, rather than the various channels that can be used to reach the customer.

According to PwC (2014) it is consumer expectations that are driving this new retail business model. Customers are quick to take their business elsewhere if they are not satisfied with their online shopping experience. Brands need to respond by doing what they can to make their eCommerce offering enjoyable, seamless and as convenient as possible. To enable this, brands need to invest in customer-focused technologies that can track customers across the various channels and aim to achieve a single view of customer.

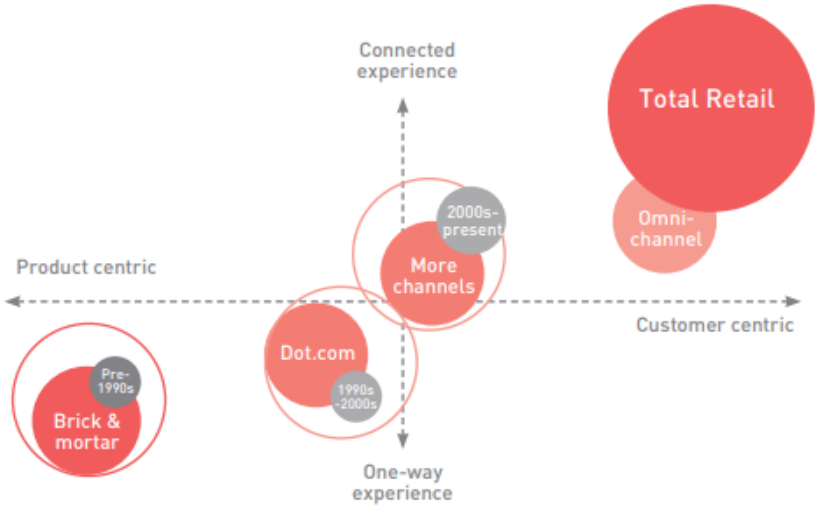


Figure 10.5.5: Transforming the channel experience to a total retail experience with more focus on the consumer Adapted from PWC, 2014

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10.6: Setting up an eCommerce site

When deciding to set up an eCommerce website there are 5 main considerations:

1. Which industry will you operate in and what products will you sell?
2. How will you build your website?
3. How will you physically ship your product and fulfil orders?
4. How will you drive traffic to your site?
5. What metrics will you measure to determine success, and which tools will you use?

Each of these considerations is important to having a successful eCommerce business. From choosing your product through to analysing your performance, decisions you make here will have a long-term impact on your business. So, carefully examine your options and make informed decisions to ensure future success.

Choosing an industry and product

To make your eCommerce business a success you need to be selling a product that consumers will want and are prepared to buy online. You also need to ensure that you are making a reasonable margin on your products to sustain your business' longevity, and that you will be able to manage physically storing and delivering the product you choose to sell.

Here are some key factors to consider when choosing an industry and product.

- **Price**

If the product cost is too low, it will be challenging to reach a positive return on investment (ROI). If it's too high, there is a good chance that some customers will want to speak with someone, or see, touch and feel the product prior to making the purchase.

- **Margin**

Many products sold online have a gross margin around 30–35% however this can change drastically depending on the industry. For example, electronics and toys typically have smaller margins while clothing and apparel are often marked up by 150% to 200%.

- **Competition**

Generally speaking, it is easier to drive sales online when the product can't be bought in local stores or in a wide variety of online stores.

- **Shipping costs**

Larger products tend to have higher shipping costs which can negatively affect sales. Most customers not only want free shipping, they expect it. As a result, it can be difficult to sell a product with a hefty shipping fee. Many online retailers include the shipping cost in the cost of the product while raising the total price and offering 'free shipping'. However, these increases in price can decrease sales.

- **Passion**

Love the product or service you wish to sell. Starting and growing an eCommerce website typically comes with a series of obstacles and frustrations. Passion for your industry can be a great source of motivation to push through any challenges that may arise.

Setting up the website

There are five important steps to follow when setting up your eCommerce website.

Step 1. Choosing your domain name

Step 2. Obtaining a secure (SSL) certificate

Step 3. Choosing the right hosting package

Step 4. Choosing an eCommerce platform

Step 5. Selecting your payment gateway.

Step 1. Choose your domain name

To get started you will need a domain name for your website. Domain names can be purchased through hosting companies or domain registrars. When choosing a domain name remember your target market, will you be targeting just your local market or an international one? If you are targeting the local market, you can register a local domain, like .co.za or co.uk, but if you are targeting a global market then it would be preferable to go with an international domain like .com

You can purchase domain names from companies like godaddy.com or www.networksolutions.com.

Here are some tips for choosing a good domain name.

- **Make it easy to type**

Remember you want users to be able to find you easily, and slang, complicated names or those with different spellings can make your site difficult to find. So choose words that are simple, easy to spell and type in your domain name.

- **Keep it short**

The longer and more complex your name, the more risk you run of users misspelling it or mistyping it. Keep it simple.

- **Use keywords**

Carefully think about words that describe your product or the keywords that users will type into search engines when searching for your brand or product. Using keywords will make your site rank higher on SERPs, which will drive traffic to your site.

- **Target your area**

If you are running a local business, try including your location in your domain name, as this will make it easier for local users to find you and may rank you higher on search engines. For example, users looking for electricians in Chicago are more likely to find ChicagoElectical.co.us than ElectricianForU.com

- **Avoid numbers and hyphens**

Although using numbers or hyphens appear clever and make sense to you, they can confuse users who often type out the number or forget the hyphen. If you need to use characters, try to register the different variations to ensure users will still be driven to your site and not to a competitor.

- **Be memorable**

There are already millions of registered domain names. Users are inundated with regular ordinary names, so coming up with a domain that's catchy and memorable will definitely help to drive traffic to your site.

- **Research it**

Before you decide on a name do your due diligence and research the name for any trademarks or copyrights. You also want to check that it is not too similar to any competitors. Failure to ignore trademarks and copyrights can result in costly legal battles and having to rebrand later on.

- **Use an appropriate domain name extension**

When registering your domain you will need to choose the extension. Extensions are the suffix at the end of your domain name, such as .com, .net and .org. Local options like .za or .uk are also popular. The .com or .net options are the most popular however, because these have been around so long, it is often problematic to get a unique and relevant name with that extension. Extensions have specific uses, so be sure that you choose the right one for your business.

Here are some of the most popular extensions, and what they mean.

.co - an abbreviation for company, commerce, and community

.info - informational sites

.net - technical, Internet infrastructure sites

.org - non-commercial organizations and non-profits

.ac - academic institutions like universities and colleges

.biz - business or commercial use, like e-commerce sites

.me - blogs, resumes or personal sites.

- **Protect and build your brand**

When choosing your domain name, it is worth purchasing other domain extensions and spelling variations to prevent competitors or trolls registering other versions that will then direct traffic to these alternate sites. By owning all the domains you ensure that customers are directed to your site, even if they use the wrong extension or misspell it.

- **Act fast**

Once you have decided on a name, you need to act quickly. Domain names sell fast, but they are affordable, so register your chosen domain name as soon as you have decided on it. If your desired name is already in use, most of the registrars will suggest alternate names to help you (Godaddy.com, 2015).

Step 2. Obtain a secure (SSL) certificate

If you are not using a pre-packaged eCommerce service, then alongside the domain name you will also need to obtain an SSL certificate to protect and secure your website content. SSL prevents malicious users from accessing your website to steal passwords, credit card information, and sensitive data. There are many providers of SSL certificates, such as Thawte or Symantec.

A list of SSL certificate reviews can be found on the following link: https://www.sslshopper.com/thawte-ce...y-reviews.html

Step 3. Choose the right hosting package

All websites have to be hosted on a server somewhere. It is important to choose the right hosting package regarding website speed, uptime, and cloud hosting.

- **Website speed**

Hosting your website in the same country that you are selling to, can have an impact on how quickly the website loads. If you are selling to a global market, then consider the use of a content delivery network (CDN) to help localize your site to different target countries. Google has hinted that site speed is a ranking factor in its algorithms so there are SEO benefits to having a good host, as well as the obvious user benefits.

- **Uptime and performance**

The reliability of the host to keep the website up and running is vital. At certain points of the year, such as peak-trading periods, the demand on your website will increase significantly. It's important to understand how the extra traffic will increase the load on your webserver and the impact that can have on the site's performance. Too much traffic may even cause the server to trip over and crash, taking your site offline.

- **Cloud hosting**:

Cloud hosting is hosting services that are provided via multiple connected servers. These servers make up a network cloud. Cloud hosting is seen as preferable to a single server or virtual server, for the follow reasons:

  - **Reliability and accessibility**

The content is more easily accessible, and there is less chance of server failure.

  - **Stability and security**

The servers will interact to sustain the site, offering more stability and more security in terms of not losing any data.

  - **Seamless scalability**

With cloud hosting you are not limited by the size and capacity of your particular physical server. The sky is the limit, unlike physical servers where you will need to expand, or move to a larger server, once you maximise that specific server's capacity.

  - **Cost efficiency**

The cloud removes a lot of the costs of maintaining physical servers.

Ensure that when choosing your host server, you consider the user needs as well as back-end applications that need to operate in the background to facilitate orders and other processes. Think about your business objectives, and if the hosting service you are opting for will be able to meet and facilitate your objectives.

Step 4. Selecting an eCommerce platform

When setting up your site, you need to use an eCommerce platform to assist you in building and hosting a digital storefront from which to actually sell your products and services. An eCommerce platform is the series of software technologies that enable this build and selling of products.

There is a vast range of eCommerce platforms that you can use. These various options can be classified under four main types of platforms. These are:

1. Software as a service (SaaS) storefronts

- Third-party providers host applications and make these available to customers online.
- Examples include Shopify.com and BigCommerce.

2. Open source

- Open source platforms provide a more affordable option for online businesses, and offer more control. However, you need to manage the hosting and some expertise is needed. Popular examples include Magento, WooCommerce and X Cart.

3. Licensed and hosted by the retailer

- The provider will manage the site, and offer reliable support. However, site builds are often tied to the specific provider and moving your site requires a complete rebuild. Large companies can also stagnate and not keep up to date, so ensure the provider you opt for is dedicated to development. Some popular examples include Oracle Commerce, IBM Websphere, Hybris, and the paid version of Magento.

4. Platform as a service (PaaS)

- PaaS is usually used for B2B where businesses are looking to link their eCommerce to other systems that their customers already have such as SAP or Ariba. Such integration of systems allows clients to link their purchasing systems directly to their online sales processes enabling automated purchase orders and stock management. PaaS is ideal for large corporates with complex procurement and distributions systems. Apache Stratos, Windows Azure, Force.com are all examples of PaaS eCommerce platforms.

Note

Read here about how more and more eCommerce store owners are turning to open source eCommerce platforms. selfstartr. com/open-sourceeCommerce/

For a more comprehensive discussion about the eCommerce options available and how to choose the right one for you, see ShivarWeb's Essential Guide to Choosing an eCommerce Platform. https://www.shivarweb.com/1386/essen...erce-platform/

Step 5. eCommerce payment gateways

A payment gateway is a service that processes credit card payments for online and brick-and-mortar stores. The gateway transfers key information between eCommerce sites and the bank, and authorises such payments. There are three steps the payment gateway performs to finalise the transaction:

1. Encryption

The data to be sent is encrypted by the web browser. This transaction data is then sent by the gateway to the payment processor that the vendor's acquiring bank uses.

2. Authorization request

The bank's payment processor sends the transaction data to the relevant credit card association. The bank that issued the credit card will view the request, and either approve or deny the transaction.

3. Filling the order

Once the processor has received authorization, it forwards this to the payment gateway. The payment gateway then sends it on to the website to proceed with processing payment if approved, or to deny the sale if denied. The website interprets the data and creates the appropriate response for the user. If approved, the merchant will proceed with filling the order.

This process takes only a few seconds, and is almost instant for the user. Gateways can also be used to prevent fraud and many have inbuilt fraud detection tools, such as delivery address verification, computer finger print technology and geolocation among others (BigCommerce, n.d).

If you're concerned about online fraud see this helpful article by Chargebee on types of online fraud and how you can protect your site. https://www.chargebee.com/blog/ protect-startup-online-fraud/

When considering payment gateways for your eCommerce site, you have two main options. You can either go for an onsite or offsite gateway.

Definition: onsite payment gateway

An **onsite payment gateway** (also known as a non-hosted payment gateway) means the gateway is integrated into your site, and users do not need to leave your site to complete their transaction. Iveri and Stripe are examples. Note that to receive online payments you will need an SSL certificate and a merchant account.

Definition: offsite payment gateway

An **offsite payment gateway** means the potential buyer is transferred over to the payment gateway's website. The user completes the payment and then is returned to the online store. PayFast and PayGate are examples. It is important to note that sending users away from your site can impact on whether customers comple their payment, especially if the payment process is slowed down by the redirection, and/or the user has any security concerns regarding the redirection (GoCardless.com, n.d.)

To fully decide which payment gateway is right for you visit GoCardless's guide on the 10 questions to find the right one for you. (https://gocardless.com/guides/posts/ payment-gateways/)

Shipping fulfilment

Fulfilment is a big part of running a successful eCommerce store, and can have a huge impact on your customer experience. The fulfilment process starts when the order is placed and ends when the customer receives the product successfully. There are six stages to the fulfilment process.

The fulfilment process

1. **Inventory management:** Ensure your stock-level information is accurate and up-to-date. Accurately forecast customer demands to manage your inventory stock-levels and plan order appropriately. Shopify has a great blog post on eight inventory management techniques to help your business. www.shopify.com/blog/70603O1...ent-techniques
2. **Warehouse management:** Ideally integrate your warehouse and stock management with a warehouse management system. This is a software application that supports the day-to-day operations in a warehouse. It will monitor stock arrivals, warehouse-store transfers and departure points. The correct and precise allocation of stock within the warehouse is critical for fast and accurate fulfilment. Some popular examples of warehouse management software include EZOfficeInventory and Zoho Inventory.
3. **Order management:** Ensure you know the order status throughout the fulfilment process and integrate notifications of delays/ disruptions in the order management process.
4. **Destination:** To offer customers a successful, fast and accurate delivery it is important to understand the destination

    - **Home delivery:** Delivery to an individual's house, apartment, place of work.
    - **In-Store collection (also known as click and collect):** Online orders are delivered to a physical store, in the customer's chosen area, for later collection by the customer
    - **Inter-Branch Transfers:** Stock is transferred from one store to another and purchased via an online order or point-of-sale.

5. **Returns:** To ensure a seamless customer experience, a returns policy, should be available and well communicated to potential customers. Any returns process should be easy and convenient for online shoppers.
6. **Order tracking:** All orders should be tracked and their progress frequently communicated to the customer. Communication should include the status and expected delivery date and time of the order. Any changes to estimated delivery dates or times need to be communicated as soon as possible.

Driving traffic to your site

To make sales, you need users to visit your online store. Driving traffic to your store is a prominent marketing and advertising specific objective. Many of the techniques discussed in the section below to drive traffic to your site, will be covered in greater detail in the rest of the course.

You can drive traffic to your store by using the following techniques:

1. **Content marketing strategy:** Highly targeted and quality content can result in a positive social influence and ultimately drive traffic to your website. It is important to create meaningful content with your customer as the main subject in your storyline. Positive customer feedback can influence other customers and drive them to your online store.

> Note
>
> Read more about the power of content marketing in the Content marketing strategy chapter.

2. **Product videos:** Include videos/ 360 degree views of your product. Visually experiencing the product closes the gap between the 'touch and feel' benefits of in-store shopping and the online experience. Customers enjoy and appreciate seeing the detail of the product and are then inspired to go to purchase the product.

> **Note**
>
> Read more about using video in the chapter on Video marketing.

3. **Alias domains:** To grow the traffic to your site, it is necessary to capture all potential customers trying to reach you. Whether that have misspelt the brand name or entered the wrong/similar name directly into a search engine rather than the address bar, it is important that they still reach the destination and that this does not become lost traffic. There are two strategies to owning alias domains:
    1. Purchase any misspelt domain names for your brand.
    2. Own the alias search terms for your brand.
4. **Social Media Campaigns:** There are so many channels to choose from when opting for social media, but it is important to use the right social media platform for the right type of advertising,
    - Use images or videos to demonstrate the benefits and details of your product. Good platforms for this include Facebook display ads, Instagram, Pinterest and Snapchat

> **Note**
>
> Read more about advertising on social media in the Social media advertising chapter

    - If your product or service targets a professional customer, use professional networks such as LinkedIn or Twitter to drive thought leadership or content marketing strategy
    - For products or services that rely heavily on social influence, understand the audience then re-target to the happy customer's network.

5. **Customer Reviews:** Research indicates that customers like to read reviews of a product or service prior to making a purchase. Encourage customers to leave reviews about their experience or the product itself. Customer reviews also provide meaningful feedback to the retailer indicating the response to new and changing product lines, which products to promote and potentially, which product to remove from the offering.
6. **Product merchandising and SEO:** All elements of online merchandising affect your search optimisation as well as directly influence the sale. Product names must be short, searchable and descriptive. Product Images must be inspiring, detailed and include specifics. Product descriptions need to be engaging and original. Text descriptions with well-chosen keywords will be picked up by search engines. Unique descriptions will prevent you being filtered out as spam by search engines.

> **Note**
>
> You can learn more about optimising your website for search engines in the Search engine optimisation chapter.

7. **Landing Pages:** Direct paid media such as search, email marketing and display media , should lead users directly to the relevant product pages and not to the homepage. These pages are called landing pages. Matching product or category landing pages to users' intent will improve drop-off rates and increase conversion rates.

> **Note**
>
> Learn more about landing pages in the User experience design and Web development and design chapters.

8. Search: Besides optimizing the site for search engines and buying paid search media (Search Engine Marketing – SEM), it is critical to include sitewide search on your page. To ensure the user finds the product, service, or information that they are looking for include an easy-to-find and easy-to-use search function. Users expect this to be at the very top or top right of your site, across most pages.
9. Site speed and performance: To avoid page-abandonment ensure that the site loads quickly with the most important elements loading first. Fast engagement time and performance is essential to keeping the user engaged and if not considered during development and monitored on an ongoing basis, could result in a poor user experience or lost customers.

10. Registration and checkout: The registration process needs to be quick and relatively painless for the user. It should only request essential information. Sites that ask for too much or unnecessarily personal information will lose traffic and result in increased drop-off rates. Checkout needs to be slick, simple, secure and informative. Checkout needs be supported with transactional emails that confirm the user's order ID, order details (product and price paid), as well as delivery and tracking information.

eCommerce analytics

As with all digital interaction, eCommerce activities can be easily tracked. There are certain key pieces of information that you need to be aware of and should be tracking. These include:

- **Supply-chain management**

Information about the products, and the process from the warehouse through to delivery to the customer.

- **Product analytics**

Details around how many times a product is viewed, positive or negative reviews, social sharing, loading of detailed information on a product and actual conversion rates.

- **Online marketing analytics**

Success or, conversion rates, of your marketing initiatives that enables optimization of spend for paid campaigns and strategy optimizations for earned and owned campaigns.

- **Tracking the eCommerce funnel**

Can customers find the products they are looking for? Can customers add products to cart and check out successfully? Analysing this data highlights site speed and performance as well as detailed information about traffic sources, high-traffic times of the day, and related conversion rates.

The most popular eCommerce analytics tool is Google Analytics analytics.google.com. Google Analytics is a powerful and detailed analytics tool. These are just some of the benefits of the platform:

- Provides a vast amount of data from conversion rates to revenue by product.
- Provides insight into customer behaviour and analyses cart-abandonment.
- Integrates digital marketing initiatives including remarketing.
- Offers detailed metrics to understand the total economic value of the online store in relation to the overall business.

> **Note**
>
> Read more on Google analytics in the Data Analytics and Conversion optimisation Chapters.

- Has promotion tracking, tracking internal (such as vouchers) and external promotional efforts (such as affiliate marketing).
- Tracks revenue by currency including online refunds for accuracy in revenue and reporting.

> Try out Google Analytics and learn about this powerful analytics platform by using Google's demo account. Google also offers some great guidance. https://support.google.com/analytics.../6367342?hl=en

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10.7: The bigger picture

eCommerce is an important part of operating a business in the 21st century. Not having an online store can be detrimental to your business. Your eCommerce store needs to operate alongside your website and online presence.

Directing potential shoppers to your online store to ultimately convert is the aim of almost all your digital marketing tactics. You online store needs to be consistent with your other online messages, and should provide a seamless experience for the user. The overall user experience with your eCommerce platform needs to be sound, simple and efficient.

It is also important to note that if your eCommerce platform falls short, and does not provide a pleasant user experience, it means all your other marketing efforts have been in vain. Directing traffic to your online store is not the ultimate goal, the ultimate goal is conversion. A sloppy online store can put potential shoppers off your brand, not just in this instance and online, but as a whole.

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10.9: Tools of the trade

There are a variety of tools relevant for working with eCommerce. We have discussed many tools during the course of this chapter, and mentioned Google Analytics as an essential analytics tool in the last section. But there are many other paid and free online tools that you could opt for.

Here are of the best tools for starting an eCommerce business, according to Inc. (Haden, 2017):

Storenvy www.storenvy.com/

Free tool for building an online store. It's a marketplace platform, but does enable you to build your own store, with your own design and branding.

Shopify https://www.shopify.com/

Possibly the most preferred tool for new online stores. Affordable with many features for your store.

Gumroad https://gumroad.com/

Considered one of the simplest ways to start an online store.

WooCommerce https://woocommerce.com/

Platform that enables you to add a store to your WordPress site or blog, providing an impressive store and business.

PayPal http://www.paypal.com/

One of the largest online payment gateways, but it can be complicated and confusing to implement.

Stripe http://www.stripe.com/

Popular payment gateway that you can integrate into your store. It works with Shopify, WooCommerce and other popular platforms.

Amazon payments https://pay.amazon.com/us/

One of the simpler payment gateways available, and run by Amazon.

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10.10: Advantages and challenges

Throughout this chapter we have discussed some of the benefits of using eCommerce. In short, with online retail already a trillion dollar industry and growing each year, to stay in business, businesses need to be operating online. It is no longer simply a nice to have, but is an essential part of business in the 21st century.

The beauty of eCommerce is that it is easily tracked and monitored. Analytics tools provide incredible data that can be monitored in real time, and changes implemented quickly. It makes this space dynamic but also incredibly competitive. Online shoppers have more variety and options than any shopper has ever had before, and catching their attention is more and more difficult. But, once you have caught potential customers' attention, your eCommerce platform has to be good enough to keep their attention and guide them through to completing their conversion.

Besides stiff competition, and being an incredibly dynamic and fast changing environment, eCommerce has other challenges. There are many factors operated by other service providers, or that are simply beyond your control. Issues such as crashing servers, slow data, errors on external payment gateways or faulty links in display ads, all impact negatively on your brand, even though you have little to no control over such issues. If a user is trying to access your online store, and these issues impact negatively on their experience, it is your store they associate this experience with.

Choosing appropriate service providers who can meet the needs and future demands of your site is key, so take time to carefully consider and review your options when setting up your site.

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10.11: Case study - Pixie Faire

One-line summary

How one couple is making US $600 000 per year selling digital products.



Figure 10.11.1: The Pixie Faire home page *Adapted From Screenshot, Pixie Faire, 2017*

The challenge

Cinnamon and Jason Miles started making and selling dolls' clothes online. Cinnamon was an excellent seamstress who made unique and beautiful clothes for her daughter to use with her dolls. After being inundated with queries on where they got these clothes, Cinnamon and Jason started Liberty Jane Clothing selling dolls' clothes online, initially through eBay and then through their own eCommerce website on WordPress.

Unfortunately, their business model was not very scalable and they struggled to meet demand and break through earning US $1 000 a month. Cinnamon was maxed-out creating all the clothing herself, and having local seamstresses assist, also did not work on any scalable level. They declined the offer of getting their products made in China, as they wanted to retain manufacturing control and guarantee the integrity of their product.

The solution

Selling the physical products alone simply wasn't scalable, so Cinnamon and Jason looked at what digital products they could sell. They hit on selling their doll patterns as downloadable PDFs, which users could purchase and use to create their own doll clothes. This model scaled well, and to date have had over 700 000 pattern downloads.



Figure 10.11.2: Pixie Faire kept the Liberty Jane brand for some of its own patterns *Adapted From Pixie Faire, 2017*

They also noticed a gap in tuition of how to actually create the clothes, so they started online classes and videos to train users on how to make the clothes with the patterns. The online training courses grew to include design, pattern-making and how to start and manage your own craft business.

They also broadened their business model to become the Internet's largest marketplace for dolls' clothing patterns, and feature other indie designers. Designers have to be approved by Cinnamon and Jason to sell through the site. They renamed their site Pixie Faire, but kept the Liberty Jane Clothing brand for their own doll clothing and patterns. They use a store-level pricing strategy that all designers have to comply with, similar to that of iTunes and Kindle, to keep prices at acceptable levels.

With increased demand, visits and purchases, the WordPress site struggled. Even with the shopping cart functionality the platform was simply ill-prepared to manage the volume that Pixie Faire was now dealing with. Opting for platforms that were designed to manage eCommerce specifically , such as Shopify and SendOwl, really helped to remove much of the frustration the company had experienced with its online sales. The peace of mind and ease that was provided by going the route was invaluable.

Results

Pixie Faire now generates over US $600 000 a year, with an average monthly return of US $50 000. This is only possible due to their move into digital products and using a platform designed to cope with the demands of larger volumes of traffic.

A physical tangible product that required so much hands-on attention simply was not scalable. Cinnamon and Jason needed an alternate digital product to provide the scale for their revenue to totally explode beyond their expectations. Careful consideration of your product and offering is necessary when determining your eCommerce needs and capabilities. (Schreiber, 2015)

This study also demonstrates the need to choose an eCommerce platform that will be able to manage with the demands of your business, should it take off. Problems with check out and crashing lead to a poor user experience that may put off potential customers. Planning your product strategy and selecting appropriate platforms are essential to eCommerce success.

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10.E: eCommerce(Exercises)

Case study questions

1. Why did Pixie Faire have to consider digital products?
2. What made Pixie Faire opt for a market site as opposed to a more traditional eCommerce site?
3. What lesson can be learnt from Pixie Faire and choosing appropriate platforms?

Chapter questions

1. What are the steps involved in setting up an eCommerce platform?
2. Why is analytics so important, and which metrics in particular would be of interest to online retailers?
3. List some of the ways you can drive traffic to your eCommerce site.
4. Explain how important eCommerce is in any digital marketing campaign.

Further reading

Here are some blogs to read up more on eCommerce,

Internet Retailer https://www.internetretailer.com/

ECommerce Training Academy blog https://ecommercetrainingacademy.com/blog/

Get Elastic http://www.getelastic.com/

Shopify blog eCommerce Business Blueprint: How to build, launch and grow a profitable online store.

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10.S: eCommerce(Summary)

In this chapter, you have learnt about the different types of eCommerce. You have also learnt the steps and been referred to the tools, for setting up a site to do business online. Key considerations and questions to ask when planning your eCommerce strategy were provided, as well as the importance of thinking about the possible future demands of your business.

You now have a sound understanding of the processes involved behind the scenes of eCommerce, and how eCommerce fits into your digital marketing strategy. Lastly you were shown how to go about tracking and monitoring your eCommerce activities, and why such analytics is important.

Although designing and creating your own complex and commercial eCommerce store is beyond the scope of this book, we hope you now have insight into its development, and know what to consider when commissioning and using eCommerce platforms.

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11: ENGAGE - SEARCH ADVERTISING

Learning Objectives

In this chapter, you will learn:

- How to put together a search advert.
- How to target your search ad at relevant users.
- The process of bidding on key phrases and how this affects your ranking.
- How to plan, set up and run your own search advertising campaign.

11.1: Introduction

11.2: Key terms and concepts

11.3: Defining search advertising

11.4: The elements of a search ad

11.5: Targeting options

11.6: Bidding and ranking for search ads

11.7: Measuring success

11.8: Tools of the trade

11.9: Case study - Frooition

11.10: The bigger picture

11.11: References

11.12: Tracking

11.13: Implementing a search advertising campaign

11.14: Advantages and challenges

11.E: Search advertising(Exercises)

11.S: Search advertising(Summary)

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11.1: Introduction

Search advertising, also called pay-per-click (PPC) advertising, is a way to advertise your business or product directly on search engine results pages, where the advertiser pays only for each click on their advert.

Online advertising continues to evolve, and available formats range from simple text search adverts through to rich media banners and even video adverts Search ads account for 48% of online ads. And more than 75% of those search ads are through Google. Google earned nearly US$ 25 billion in search ad revenue alone for 2016. Their market share is expected to hit over 80% by 2019, with an expected revenue of over US$ 35 billion (Townsend, 2017).

Adverts on search engines are easy to spot as they're clearly labelled as advertising and are separated from organic search results. They can appear on the top of the results page, usually in a box, or at the bottom of the results page.

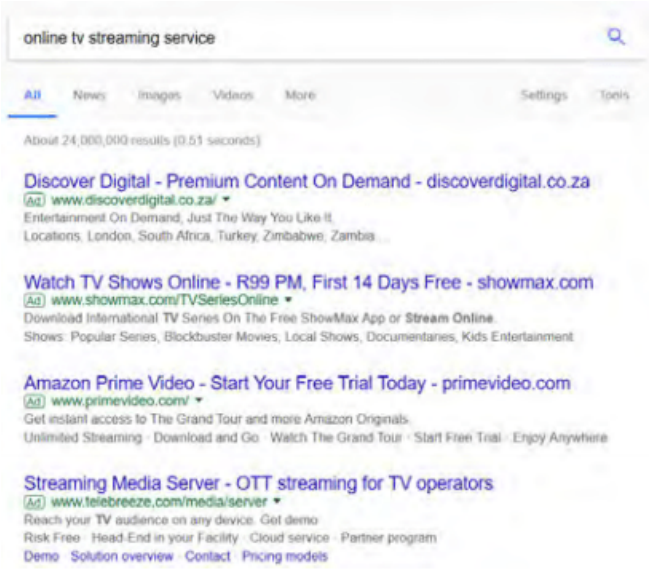


Figure 11.1.1: Search adverts appearing in a search for digital marketing *Adapted From Screenshot, Google, 2017*

Search advertising on search engines is keyword based. This means that it is triggered by the search term that a user enters into a search engine. Advertisers target the keywords for which they want their site to appear.

For the advertiser, the beauty of search advertising is that adverts are displayed when potential customers are already expressing intent meaning customers are searching for a product or service. It allows advertisers to present their offering to a potential customer who is already in the buying cycle.

Google is, by a wide margin, the leader in the search advertising field; because of this, the chapter is very Google-centric, though the same principle should apply to any other search advertising platforms. Other platforms to be aware of are Bing, Yahoo! and Baidu.

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11.2: Key terms and concepts

Table 11.2.1

Term	Definition
Clickthrough	A click on a text ad link that leads to a website.
Clickthrough rate (CTR)	The total clicks on a link divided by the number of times that ad link has been shown, expressed as a percentage.
Conversion rate	The number of conversions divided by the number of visitors, expressed as a percentage.
Cost per action (CPA)	The amount paid when a certain action is performed by a user.
Cost per click (CPC)	The amount paid when a link is clicked on.
Google AdWords	Google's search advertising program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
Impression	Each time an advert is shown.
Key phrase	Two or more words that are combined to form a search query, often referred to as keywords.
Keyword	A word found in a search query. For example, a search for 'blue widgets' includes the keywords 'blue' and 'widgets'.
Organic results	Also known as natural results. Search results served by the search engine's algorithm. The search engine does not charge website owners to list these results.
Paid search advertising	Usually refers to advertising on search engines, sometimes called pay-per-click or PPC advertising. The advertiser pays only for each click on the ad.
Quality score (QS)	A measure used by Google AdWords to indicate how relevant a keyword is to an ad text and to a user's search query.
Return on investment (ROI)	The ratio of profit to cost.
Search term	The keywords a user enters when searching on a search engine.
Search engine results page (SERP)	The actual results returned to the user based on the search query. Sponsored results are search engine results that are paid for by the advertiser.

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11.3: Defining search advertising

As discussed, search advertising involves placing online advertisements on search engine results pages to connect your product with consumers who are likely to be in the buying phase of the customer lifecycle.

Search engines display results to search queries based on proprietary algorithms. Each major search engine uses its own formula to determine what results to display for any term. The vast majority of searchers don't click through to the second page of results (less than 10% of people do), which means they are likely to find what they're looking for on the first page (Sharp, 2014). With search engines getting so much traffic, and delivering so much value, they need to find a way of generating revenue.

With so many search engines out there, which platform should you choose?

There are some small differences from platform to platform in terms of editorial policy, and each system has a different user interface. There is some theory that different platforms are better for different industries, for example, that Yahoo! fares better than Google on travel advertising. However, this is subjective, and most large advertisers will run PPC campaigns on a number of platforms. As with most things in digital marketing, it is all about testing.

Google AdWords is the best known and is considered the industry standard; it allows users to transact in the currency of their choice, is tied to a comprehensive analytics tool, and offers training programmes and certifications. Google AdWords also currently has the best contextual and geographical targeting worldwide, although geo-targeting is also offered by Bing Ads, Facebook Ads, LinkedIn Ads and YouTube video ads (which is closely linked to AdWords).

Structuring your search advertising campaign

When you start running search advertising, you shouldn't just create a whole stream of ads, you need to have a plan.



Figure 11.3.1: The main constituents of an AdWords campaign *Adapted From Stokes, 2013*

Your AdWords account is your home for all the ads you are currently running, and it should be structured to reflect your business and marketing strategy. Within your account, organise your search adverts in groupings, called campaigns, according to your strategy and the ads you are running. Within each campaign, you should have ad groups; these are sets of ads that have a common characteristic or focus. For example, if you are selling books online, you may have ad groups focused around a specific genre, author, event and special offer, as well as some ad groups around general themes such as promoting local stores, or making online sales.

Note

Many search advertisers create ad groups for branded terms, competitor terms and generic key phrases related to the industry.

Structuring your account in this way will help you to easily oversee your advertising spend, determine the effectiveness of your ads, manage your ads and bids, and switch off any ads that aren't working effectively.

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11.4: The elements of a search ad

As of October 2016, Google phased out their basic text ads and replaced them with expanded text ads to reflect their more mobile friendly approach. These ads have the following format:

Heading 1 – Heading 2

- One expanded line of descriptive advert copy, sometimes breaking over two lines depending on device size.
- www.DisplayURL.com
- Ad extension.

As you can see, these ads consist of several elements; the key is to make these work together harmoniously to get searchers to click through to your website. The three main components are:

- Keyword optimised ad text
- The link to your owned property (website, social media platform, content)
- Ad extensions.

Ad text

The ad text is the main component of a search ad. Search engines limit the characters in each line, though expanded text ads double that character limit in most cases. Google can sometimes show the headline and the first line of ad text in the same line, followed by the display URL and then the second line of ad text. There are also restrictions on what you are allowed to write in an advert. Here are some of the editorial guidelines from Google AdWords:

Expanded text ad character limits:

- **Headline part 1:** maximum of 30 characters
- **Headline part 2:** maximum of 30 characters (This will be shown after the first headline, usually separated by a hyphen, and may wrap around to the second line for mobile)
- **Single description line:** maximum of 80 characters
- **Display URL:** domain name automatically extracted from your final URL (URL path can be customised using two field options with a 15 character limit each).

General guidelines:

- No repeated exclamation marks.

> Note
>
> These character limits and guidelines are very strict. If you fail to adhere to them, Google simply won't publish the ad.

- No word may be written in capitals only.
- No nonsense words may be used.
- No claims of 'best', 'number one' or superlatives may be used unless they can be verified by a reliable third-party source.
- Product numbers may be used.
- No phone numbers allowed in the copy.

Writing effective copy

or most PPC ads, the ad copy is the only tool available to attract attention, convey a message and entice action. This is why writing effective ad copy is such an important skill for search advertising.

Users who are searching for something usually have a specific intent; they are looking for information, guidance, comparisons,

tools, or solutions to their problems. It's important to understand why users would look for your brand or product and what keywords they would use to find it when crafting your search ads. Look at the considerations for choosing keywords that are covered in the Search engine optimisation chapter as these often overlap.

> **Note**
>
> Read more about this in the Search engine optimisation chapter.

Use compelling and well-crafted calls to action so that users know what to do and what to expect: 'try now', 'sign up now', 'buy now'.

> **Note**
>
> Read more about this in the Digital copywriting chapter.

Many advertisers test offers in the advert copy, such as a discount or limited time voucher. Product or service benefits make for good advert copy, such as free shipping, secure shopping or fast delivery.

If you are running many ads at once, it can be quite a lot of work to create unique copy for each one. Dynamic keyword insertion (inserting the search keyword dynamically into the advert copy that appears) or using the keyword in the advert copy can help. Dynamic keyword insertion takes the keyword in your campaign that matches with the user search query and inserts it into the ad automatically. This way, your ad looks more relevant to the user than a generic ad. The search engine will mark words that match the search term in bold, making the advert stand out a little bit more.

The downside of using dynamic keyword insertion is that you have less control over when an ad is shown to a user, and the results may not be as good as with a standard SEM campaign. The goal is to generate as many clicks as possible, but sometimes the advertiser is better off with fewer, high-quality clicks that are more likely to generate actual sales.

The long tail

Internet Live Stats asserts that 16–20% of search queries on the web have never been asked before (Internet Live Stats, 2016). This means that the sum of searches that are unique is higher than the sum of non-unique searches. Looking a little more closely at search terms will show a small number of high-volume searches, and then a large number of lower volume searches stretching out to those unique searches.

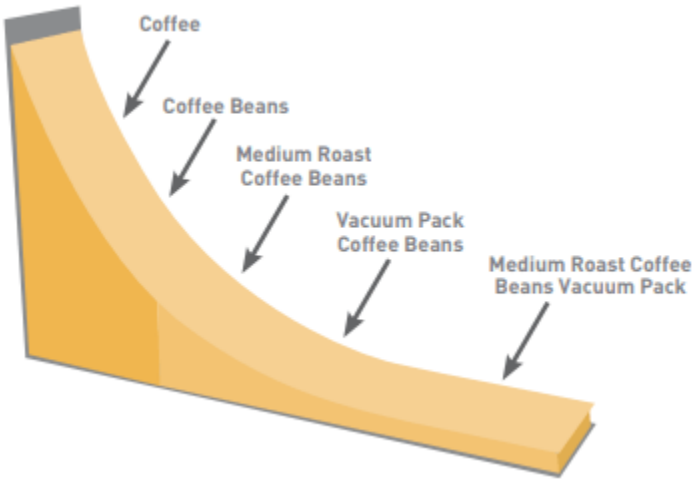


Figure 11.4.1: An example of long tail keywords *Adapted From Stokes, 2013*

Note

What's more important to your brand, a high volume of traffic, or a smaller number of qualified leads? Consider your strategy when deciding whether to use short- or long-tail keywords.

This is sometimes referred to as the long tail of search. Discovering these lowvolume, niche search terms can do wonders for a search advertising campaign.

Generally there is not much competition for these search terms, and the search term itself is very much targeted, so it will likely be cheaper to bid on and may yield a high conversion rate. While long-tail phrases are generally cheaper and lead to a higher rate of conversions, you will need to use a much larger number of them to make up for the lower traffic volume that they generate.

Also consider that search engine users may be at various stages of the buying cycle, and it could be worthwhile to craft a long-tail keyword strategy targeting those who are at the end of the buying cycle and know specifically what they are looking for.

For example, if you sell cameras, targeting the term 'camera' may not bring in much targeted traffic (since users searching for 'camera' may be looking for information, pictures, price comparisons, or even something completely unrelated). But users looking for 'buy Canon DSLR camera in London' has a clear intention in mind and could be a great target for advertising.

Display URL

Search ads allow you to include a display URL. The URL shown is not necessarily the URL that the user will click through to; the display URL (what is shown on the advert) actually directs to the destination URL (what the actual URL of the page is). The display URL is sometimes also called a vanity URL.

Note

The display URL should be short, clear and meaningful to the viewer. It should indicate what type of page the user will be taken to when they click.



Figure 11.4.2: A Google search advert with a clear display URL *Adapted From Screenshot, Google, 2017*

The display URL must be the same domain as the destination URL and Google pulls this out automatically. Google will show only one advert per domain.

The page that the user is taken to is called the landing page, which can be any page on your website, not necessarily the home page. The aim should be to send users to a web page that is as specific to their search, and the PPC advert, as possible. This is known as deep-linking.

Landing pages

Search advertising is not just about creating adverts and bidding for keywords. The process continues once a user has clicked on your advert. The page that the user reaches by clicking on an advert is called a landing page and is either an existing page on your website, or a new custom-built page for the campaign at hand (useful if you are running a competition or special offer).

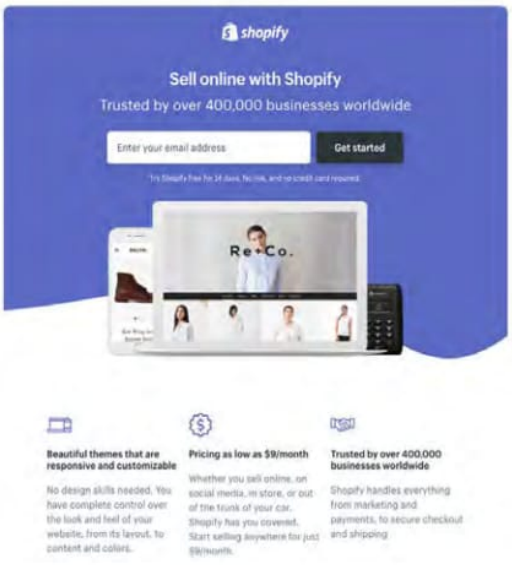


Figure 11.4.3: The Shopify landing page *Adapted From Screenshot, Shopify, 2017*

Landing pages can make or break an advertising campaign. Poorly executed PPC campaigns will send all users to the home page of a website. Campaigns that convert will make sure that users land on a page that is relevant to their search with a very visible call to action. The aim is to keep the user as focused on the goal, conversion, as possible. Sending users to the home page gives them too many other options to choose from.

> For example, if users searched for 'Canon EOS 1300D', a poorly run campaign would send them to www.canon.co.uk. A better campaign would have the user clicking through to www.canon. co.uk/for_home/product_finder/cameras/digital_slr/eos_1300d/.

Landing pages also indicate relevance to the search engine, which can increase the Quality Score of the advert, and in turn lower the cost per click (CPC) of the keyword. Adding keyword-rich pages to the website can also have SEO benefits. PPC campaigns often have thousands of keywords, which can mean that you will have a lot of landing pages to build. Creating dynamic landing pages means that with a simple script, unique keyword-rich landing pages can be created for every search. The script will take the keyword that the searcher has used, and insert it in predefined places on the landing page. The user will then be landing on a page that is highly relevant to their search.

> **Note**
>
> Read more about this in the Search engine optimisation chapter.

Ad extensions

> **Note**
>
> Google is constantly testing and adding new ad extensions so check in often to see what's new.

Google offers several ways to add value or information to search adverts. These are referred to as ad extensions. For a search advertiser, the ad extensions offer a way to get additional information into a search advert without affecting standard advert copy limits.

AdWords currently offers six manual extensions and four automated extensions, for a total of ten. Some of these will be more useful for mobile, such as the locationspecific ones. The manual extensions are as follows:

1. Location extensions

Location extensions allow you to add location information and maps to your advert (you can add map pins, navigation assistance, and a call option). To use the extensions, you can either insert your address manually or link your AdWords account to your Google+ Local (www.google.com/local) account.



Figure 11.4.4: A location extension *Adapted From Screenshot, Google, 2017*

2. Call extensions

The call extension allows you to display a local phone number in a line below the standard text advert. This is particularly effective in mobile ads, where the user can click and call directly from their phone.



Figure 11.4.5: A call extension *Adapted From Screenshot, Google, 2017*

3. App extensions

The app extension adds a link below your ad that sends users to the app store or begins a download of your app.

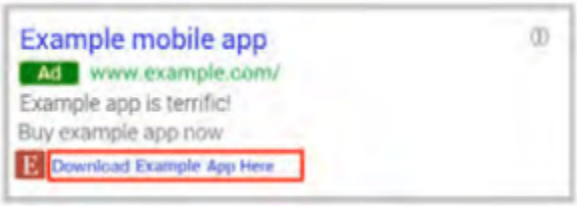


Figure 11.4.6: An app extension *Adapted From Screenshot, Google, 2017*

4. Review Extensions

This shows positive third party reviews, generally from trustworthy sources.



Figure 11.4.7: A review extension *Adapted From Screenshot, Google, 2017*

5. Sitelink extensions

Sitelinks add up to six extra links to pages on your site that might help users find what they're looking for. Sitelinks are limited to 25 characters for most languages. Sitelinks allow you to direct users to more relevant areas of your website, all from one advert.

They are suitable for advertising on more general or branded keywords.

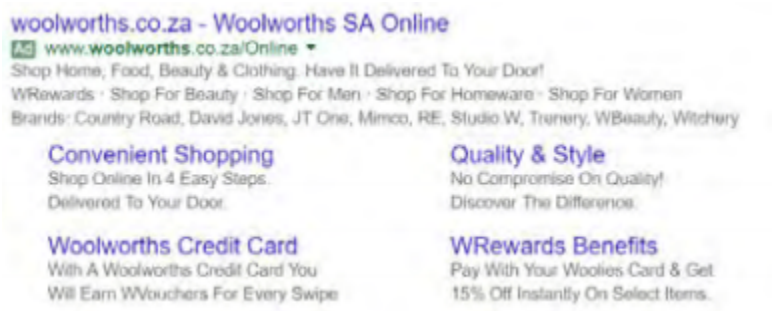


Figure 11.4.8: Sitelink extensions *Adapted From Screenshot, Google, 2017*

6. Callout extensions

These allow you to include additional text with your search ads, such as more information about your business, products, and services.



Figure 11.4.9: Callout extensions *Adapted From Screenshot, Google, 2017*

The automated extensions are as follows:

7. Consumer ratings

This shows your best ratings below your search ads, with a link to more ratings; this is useful if you have very high ratings!

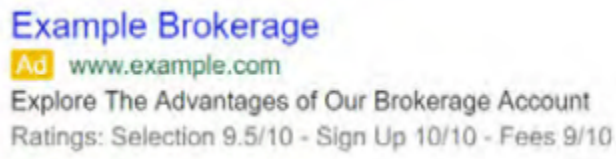


Figure 11.4.10: A consumer rating *Adapted From Screenshot, Google, 2017*

8. Previous visits

These let users know whether they've visited your site before, and when. These are useful if users are trying to find their way back to your website or to encourage one-time customers to return.

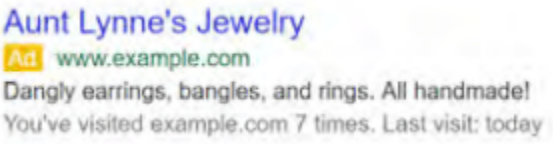


Figure 11.4.11: A previous visit extension *Adapted From Screenshot, Google, 2017*

9. Dynamic structured snippets

Dynamic structured snippets automatically show additional landing page details, which helps searchers to determine whether your site contains the kind of information they're looking for. This information comes from content on your site.



Figure 11.4.12: A dynamic structured snippet *Adapted From Screenshot, Google, 2017*

10. Seller ratings

These show online business ratings with your ad, showing what kind of reputation you have for good service. The seller ratings come from reputable sources that compile a number of business reviews to help users make more informed decisions and to help your ad perform better.

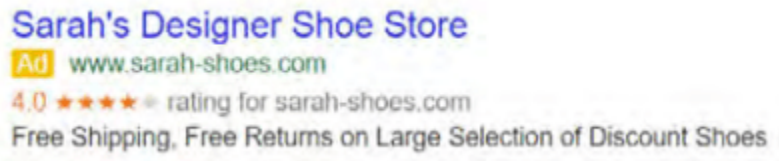


Figure 11.4.13: Seller ratings *Adapted From Screenshot, Google, 2017*

Message extensions

At the end of October 2016, Google announced message extensions, which give users the change to click to text a business straight from the search engine results page. Advertisers can include a pre-written text message to make things easier for mobile users. Tests on these extensions have shown that they significantly improve mobile clickthrough rates but they cannot currently be tracked as conversions in AdWords.

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11.5: Targeting options

Search adverts are targeted in a variety of ways, depending on how you want to reach your intended audience. Targeting your adverts means you know that the traffic you are getting is relevant to your product.

Keywords and match types

It's not enough to simply pick the right keywords; you need to know about the different ways in which the search engine interprets and matches the search term to your chosen keyword.

Most search engines require the advertiser to provide the search keywords for which their advert should appear. Considering the massive volume of searches conducted every day, it would be impossible to determine all the possible terms potential customers might use to find you. That is why there are different keyword match types for search advertising.

Google AdWords using the following match types:

- Broad match
- Broad match modifier
- Phrase match
- Exact match
- Negative match.

Broad match means that your advert will appear for the keywords you have entered, as well as search terms that contain your keywords and any other words in any order, as well as some variations of your keywords such as misspellings and synonyms.

The broad match modifier is an additional targeting option that gives you tighter control than broad match by excluding synonyms but including other versions of the word, such as plurals. It's implemented with a + before the keyword.

Phrase match, which is denoted with quotation marks around the keywords; 'phrase match' means that your advert will appear only for search terms that have your keywords in them, in the same order, though other words may also be in the search term.

Exact match, denoted by square brackets [exact match] means that the advert will appear for search terms only exactly the same as the keywords selected.

Negative match, denoted by using a dash in front of the keywords; –negative means that your advert will not appear in searches using that word, no matter what other words are used.

Advertisers can assign as many keywords as they want to an advert, but only one advert for each URL will be shown. If two advertisers are bidding to show adverts for the same domain, only one will be shown. Which advert will be shown is based on the bids being placed and on the quality of the adverts (more on that later).

Language and location targeting

Search engines have versions customised for specific regions and languages, based on the user's settings and where in the world they are searching from. As a search marketer, you can choose the language and the location of the search engine to target. This is known as geo-targeting.

For example, you may want your advert to show only to English searches in Asia, or to French searches in Johannesburg. Targeting your advert means that your ads won't be seen by users outside your target area, and you won't pay for traffic that you cannot convert into customers.

Behavioural and demographic targeting

Search advertising can also be targeted based on personal behaviour. Using AdWords, you can re-target visitors who came to

your site via an AdWords advert based on actions that they took. This means that if users came to your site, but did not complete a purchase, you can target adverts to them in the SERPs or through other online advertising channels, such as the Google Display Network. This is called re-marketing or re-targeting, and can be very effective for remaining top of mind until the user is ready to convert. It is usually advisable to cap the number of times a re-marketing ad is shown to an individual to avoid annoying them.

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11.6: Bidding and ranking for search ads

As you know, search adverts are charged on a per-click basis. The cost that you pay for every click is determined by a variety of factors, and is based on a bidding system.

The different advertising platforms offer advanced bidding options, all aimed at helping you to run your advertising campaign better. You can bid for placement on the SERP, or you can bid based on how much you are willing to pay per click. You are also able to tailor your approach to, for example, bidding for adverts during certain times of the day only.

Search advertising is usually run as a Vickrey auction model, so advertisers place bids to appear based on certain criteria. The advertising platform determines when adverts are eligible to appear and serves them as is appropriate. The advertiser then pays the advertising platform when their advert is clicked on.

Advertiser	Bid price	CPC
A2	$3.00	$2.51
A1	$2.50	$2.36
A3	$2.35	$2.06

Figure 11.6.1: Three advertisers bidding on the same key phrase *Adapted From Stokes, 2013*

With search advertising, the advertiser:

- Creates the copy for an advertisement.
- Determines the landing page for the advert.
- Selects the keywords or criteria for which that advertisement should appear.
- Chooses the maximum amount, the cost per click (CPC), that they are willing to pay for a click on the advert.

The advertising platform:

- Checks the advert for compliance with editorial guidelines.
- Displays the advert for relevant search queries or other criteria.
- Determines the rank of the advert based on the advertiser's maximum bid and the relevance of the advert (which includes factors such as clickthrough rate, ad copy, keyword and landing page relevance).

In Google AdWords, as well as deciding on your CPC bids for your keywords, you are able to set budgets for your campaign. You can set daily budgets, monthly budgets, or no budget. Once your total is reached, your adverts no longer run, so you can be sure that you never overspend. If you are concerned about overspending, you can set a daily budget. However, this can mean that your adverts do not run as often as you may like them to.

Conversion and clickthrough rates

Search engines look at factors such as relevancy to try to ensure that it is not just advertisers with deep pockets that can land the top ad listing. Search engines need to ensure that users find the adverts relevant, otherwise they'll be less likely to click on them, and no click means no revenue for the search engine.

Studies repeatedly show that those adverts nearer the top of the page attract the highest clickthrough rates (CTRs) (Smart Insights, 2016). Competition for these top spots can be fierce and the cost per click can be very high.

Ads at the top of a page generally have the following qualities:

- They are very relevant to a user's search query.
- They consistently perform well, with high CTRs over time.
- The CPC bid is competitive and outbids other ads of the same quality. (Google AdWords, n.d.)

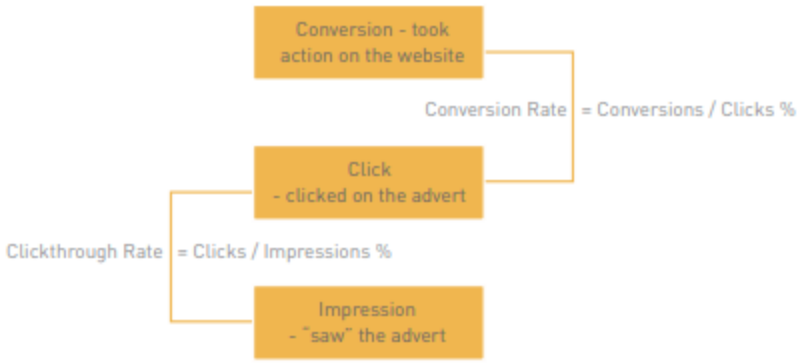


Figure 11.6.2: An image illustrating clickthrough and conversion rates *Adapted From Stokes, 2013*

The bidding process

Advertisers need to determine the maximum they are willing to pay for a click on their advert, and they need to decide this for each keyword they enter for an advert.

This bid is the maximum cost per click (max CPC).

However, this will not necessarily be the CPC that the advertiser must pay for a click. Every time a search query is entered, the search engine runs an auction to determine the placement of the adverts where advertisers have bid on that search term. This auction is known as a generalised second price (GSP) auction, which is a variation on the Vickrey auction.

In the GSP auction, each advertiser will pay the bid of the advertiser below him, plus a standard increment (typically US $0.01), for a click on their advert.

Say three advertisers, A1, A2 and A3, bid US $2.50, US $3.00 and US $2.35 respectively on the same keyword. The search engine has set a minimum price of US $2.05 on that same keyword. Here is how the adverts would be positioned, and what they would each pay for a click:

Advertiser	Bid price	CPC
A2	$3.00	$2.51
A1	$2.50	$2.36
A3	$2.35	$2.06

Figure 11.6.3: GSP payments per click *Adapted From Stokes, 2013*

AdWords Quality Score

When it comes to ranking, of course, it's not quite as simple as that (it rarely is!).

As well as the bid an advertiser places on a keyword, the search engine will take a number of other factors into account. In the case of Google AdWords, this is known as Quality Score. Quality Score is applied on keyword, ad group and account level. It is important that your entire account has a good Quality Score, as it affects ranking and the cost per click.

The Quality Score is determined by, among other factors:

- The relevance of the keyword to the search term
- The relevance of the advert copy to the search term
- The relevance of the landing page to the search term
- The historic CTR of that advert.

Quality Score is ranked as follows:

Great (8, 9, 10): Keyword is very relevant and QS needs no improvement.

OK (5, 6, 7): Keyword is relevant, but can still benefit from a higher QS.

Poor (1, 2, 3, 4): This keyword isn't very relevant and QS needs improvement.

Another way to think of the Quality Score is as a discount that is applied to your campaign. For instance, an advert with a great Quality Score can achieve a top position at a lower bid than a competing ad with a poor Quality Score. For example, an advertiser with a Quality Score of 5 will have to pay twice as much for a certain position as an advertiser with a Quality Score of 10.

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11.7: Measuring success

How do you know if a campaign is performing well? You may think that more clicks are better, but is this necessarily the case? Being in the top position means that you may pay more per click. When your advertising budget is limited, it is often more cost effective not to bid too much for your keywords and to occupy the lower ad positions. Because you'll pay less per click, you can achieve more clicks, and potential customers, for your limited search advertising budget.

Advertisers need to consider what users do after clicking through to the advertiser's website from the search engine. When planning a search advertising campaign, it is crucial to set the goals of the campaign upfront, and make sure that these are attainable. With a goal set up, the advertiser can track how many of the users that clickthrough to the website follow through to that goal. This is called a conversion.

Goals could be:

- Buying a product
- Filling in a form or quote
- Downloading a white paper
- Sending an enquiry
- Booking a flight.

We know that the CTR of an advert is the number of clicks out of the total impressions. The conversion rate of an advert is conversions divided by clicks. The cost per action, or the cost per each conversion, is the total cost of the campaign, divided by the number of conversions. The average cost per click is the total cost of the campaign divided by the number of clicks.

As the advertiser, you also need to know the value of each conversion. If the value of a conversion is less than the cost of achieving it, you effectively lose money with every conversion. Knowing the value to your business of a conversion will enable you to run search advertising campaigns profitably.

	Impressions	Clicks	CPC	Total Cost	CTR	Conversions	Conversion Rate	CPA
A	1134	55	$ 0.89	$ 48.95	5%	5	9%	$ 9.79
B	1134	123	$ 1.36	$ 167.28	11%	11	9%	$ 15.21
C	2256	225	$ 0.89	$ 200.25	10%	11	5%	$ 18.20

Figure 11.7.1: Adjusting bidding strategies based on business principles *Adapted From Stokes, 2013*

You also want to look at your share of voice, which is your brand's share of the total advertising exposures for that sector or product type. This helps you measure how visible you are during your campaign.

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11.8: Tools of the trade

The foundation of search marketing is keyword research, and there are a number of tools that will help you grow your keyword list, and also to determine keyword volumes. Some are free and some require payment. All these tools should be used as guidelines only. They usually provide trends and estimates rather than specific values. Test the data with your own campaigns to determine what works best for you.

Ad management tools

- Google AdWords Editor: https://www.google.com/intl/en/adwordseditor/

Keyword volume tools

- tools.seobook.com/general/keyword

Keyword suggestion tools

- adwords.google.com/keywordplanner (free account required)
- www.keyworddiscovery.com/search.html
- tools.seobook.com/keyword-tools/seobook/

Google AdWords has an Ad Preview Tool, which allows you to see whether your advert is appearing on the page without using the search engine and thereby skewing quality score data. This can be accessed at adwords.google.com/select/AdTargetingPreviewTool.

Some paid services that aid with keyword research are: www.wordtracker.com

- www.advancedwebranking.com
- Also consider other ways to research your industry and brand, for example, Google Trends (http://google.com/trends) can show keyword search volume over time.

Spreadsheets, such as Microsoft's Excel, are useful to aid you in building your keyword lists. Getting to grips with functions such as Concatenate and Vlookup will be useful.

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11.9: Case study - Frooition

One-line summary

Frooition, a web design firm, increased conversions and cut costs by optimising its PPC and SEO campaigns.

The challenge

Frooition proves creative services and apps for more than a quarter of a million customers around the world. They wanted to overhaul their SEO and PPC efforts so that they could maintain their current levels of sales conversions while simultaneously reducing their marketing budget.

The solution

They partnered with Vertical Leap to change their SEO and PPC campaigns. Their solution operated on several levels:

- They found that eBay was limiting exposure of Frooition ads and requested removal of the restriction placed on the ads.
- They restructured the entire account using historical data so that they could better focus budget. Keywords that didn't work well were removed, and keyword match types were refined to better targeted search terms.
- They wrote new ad copy to match the new structure of the account and improve the keyword quality score.
- They adjusted the ad schedule so that high-performing hours of the day were targeted.
- They created new ad extensions to highlight USPs and improve clickthrough rates.

Results

Because of the removal of poorly performing keywords and refining of targeting, they decreased the number of impressions by 33% and reduced overall spend by 65%. The quality score improved dramatically, and cost per click was reduced by 52%. The changes to ad copy and ad extensions, along with the targeting, increased the clickthrough rate and conversions were up as well.

In summary:

- Cost per conversion dropped by 70%
- Total conversions increased by 21%
- Conversion rate went up by 65%
- Overall costs dropped by 65%
- Clickthrough rate increased by 69% (Digital Training Academy, 2016).

By using data and actionable insights carefully, this Frooition and Vertical Leap radically improved the PPC campaign.

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11.10: The bigger picture

Search advertising and search engine optimisation (SEO) should go hand in hand to create an effective search engine marketing strategy. The greater the part of the search results page that you own, the better.

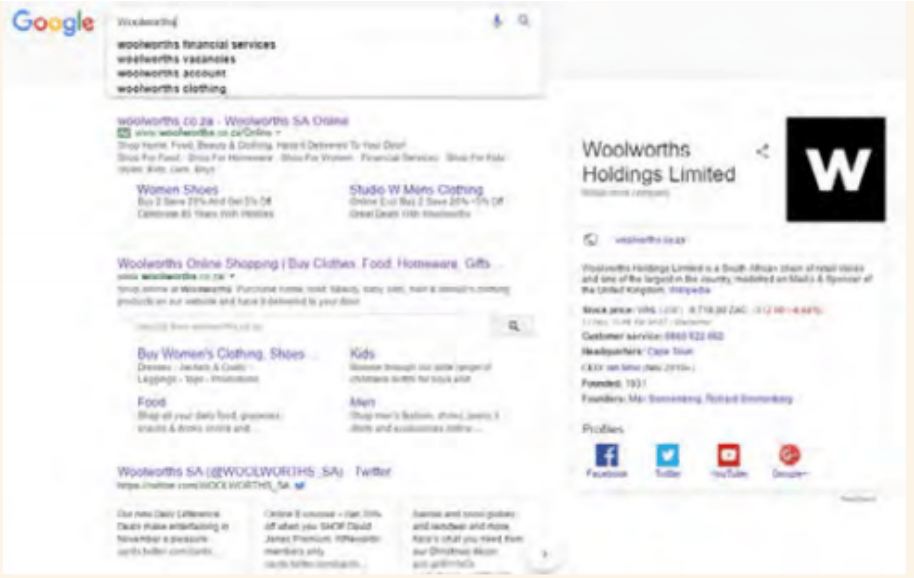


Figure 11.10.1: Brand search ads and organic results appearing together *Adapted From Screenshot, Google, 2017*

Search advertising is an excellent source of keywords and conversions. This insight can be used to improve the SEO of a site, as you will already know the relevance of these keywords to your intended audience. In turn, improved SEO rankings and social media interactions can help to reduce the CPC of your search advertising campaign, improve your Quality Score and raise your CTRs throughout.

Search advertising can also help to give your brand immediate search engine presence for your offline campaigns, when these might not yet be highly ranked in the natural search results. Search advertising can also be used together with online crisis management. If a company is unable to combat negative search results through the natural rankings, they are always able to bid for search adverts that can present their view.

Having a firm grasp of search advertising on search engines will provide a good foundation for running digital advertising campaigns across other networks and ad types.

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11.12: Tracking

In order to report on campaigns all the way through to conversion, you need to use appropriate conversion tracking. Conversion tracking is usually accomplished with a small tracking pixel that is placed on the conversion confirmation page of the website.

Google AdWords offers conversion tracking tags, which will allow you to report on AdWords campaigns from impression through to conversion. The AdWords interface provides a wide range of useful reports.

In order to track many other networks, however, third-party tracking needs to be used. Most ad serving technology will also enable pay-per-click tracking, usually at a nominal additional cost per click. If you are running display campaigns through these networks as well, this has the benefit of reporting on how the campaigns might influence each other.

If you are sending traffic to a website that uses Google Analytics, you can use campaign tracking to track and report on campaigns that are driving traffic to the site. You can link your AdWords and Analytics accounts to share information across these platforms, such as the cost paid per click in Google Analytics and some basic analytics information in AdWords.

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11.13: Implementing a search advertising campaign

Do your homework

For a successful campaign, you need a full online and offline analysis of the business, customer demographics, industry and competitors. While it is relatively quick to set up a campaign, pre-planning will show dividends later. You need a brand, an identity and a clear, unique selling point. You get only three lines to advertise, so you need to make sure you know what must be included and how to make the most impact.

Define your goals

You need to know what you want to achieve with your search advertising campaign.

Branding campaigns, for example, are very different from campaigns to increase sales. What do you want users to do once they click on your advert?

Budget, cost per action (CPA) and targets

Determine how much you are willing to spend to achieve your goal, your target CPA. Decide how much budget you are going to allocate to your search advertising campaign. If your goal is to increase revenue, your budget may be unlimited as long as revenue is increasing and you are within your target CPA.

Keyword research

You need to determine what keywords potential customers are likely to use when searching for the service that you offer. Along with that, you need to know:

- What common misspellings or typos a customer might use.
- What words would show that they are not likely to purchase from you, such as ‘free’ and ‘cheap’.
- As part of your keyword research, you need to look at expected volumes for your keywords, so that you know how to bid. There are also tools that will show you similar or related keywords, so you can expand your keyword list even further. See the Tools of the trade section (below) for some suggestions.

Write the adverts

Using your keyword research, write compelling adverts to promote your products. Adverts can be unique to one keyword, or you can group them and have a number of keywords for one advert.

Make sure you use an appropriate display URL, and that you target the landing page for each advert.

Place your bids

Based on your goals and keyword research, set the maximum bids for your keywords. Don’t set these too high at this stage as you’ll tweak the bids as you test your campaign. That being said, don’t make them too low either, or you won’t get much traffic, and it could affect your Quality Score. Test your ad to find the right balance in line with your goals. AdWords also provides tools that can help to guide your decisions.

Tracking

Get your tracking tags in place, especially any conversion tracking tags.

Measure, analyse, test, optimise!

With tracking in place, you can analyse your ROI down to a keyword level, and then focus your campaign and budget on the keywords that are converting best.

Consider how changing the text, image or video of your advert could increase the CTR, or your conversion rate. Test different landing pages to see what converts better.

Test the networks too. Your Bing campaign may perform better than Google, or your Facebook account may drive cheaper traffic. Always keep your goals in mind and work, work, work to achieve them.

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11.14: Advantages and challenges

There are many reasons why search advertising can be an excellent addition to any digital marketing strategy.

- **No to low cost barrier**

You pay only for traffic, there are usually no setup fees involved, and all the tools you need to start out with can be accessed for free.

- **Tracking every cent**

Search advertising allows you to track your advertising spend down to a keyword level, so you can learn what works and what doesn't on a micro scale.

- **Targeted advert placement**

You can make your advertising relevant by using filters, targeting your ads to specific users, or even in the way you use keywords and match types.

- **You're giving your customers what they want**

Search advertising lets you put your advert in front of users who are searching for your product. It lets you provide a solution, as opposed to creating an interruption.

Search advertising campaigns are quick to set up, can provide high volumes of traffic, and are highly trackable. But there are some pitfalls that you should be aware of.

Click fraud

Click fraud occurs when your advert is clicked on by users who are not legitimate potential customers. Because an advertiser has to pay for every click, sometimes unscrupulous competitors can click on the advert to force the payment. There are even automated bots that can click on adverts, costing advertisers millions.

Search engines have taken measures to combat this and click fraud is no longer widely prevalent. Advertisers can report suspected click fraud, and the search engines will refund invalid or fraudulent clicks after investigation.

What can you do? Keep an eye on your campaign. Any sudden leap in CTR should be investigated, and you should pay particular attention to see if the conversion rate drops, which would indicate potential fraud. Pause the campaign if you suspect fraud, and alert the search engine.

Bidding wars and climbing CPCs

High-traffic keywords are expensive, and the battle to stay on top means that the CPC of these keywords is escalating. Convincing yourself that it's number one or nothing can result in burning through your campaign budget quickly with nothing to show for it.

Keep focused on your campaign goals and ROI, and keep investigating to find less expensive niche keywords that work for you.

Keeping an eye on things

Search advertising campaigns require a lot of monitoring and the bigger your campaign gets the more time this takes. Search advertising can provide a fantastic ROI, but you need to check in and tweak regularly to make sure that it continues to perform for you.

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11.E: Search advertising(Exercises)

Case study questions

1. Why was this campaign trying to reduce the number of impressions?
2. Which aspects of best practice worked together here to achieve the desired effect?

Chapter questions

1. Why would competitors commit click fraud?
2. When should you use certain search types for AdWords, and why would this matter? How does it affect the number of conversions?
3. Why should one use relevant landing pages when running a search advertising campaign, and how does this affect the number of conversions?

Further reading

www.ppchero.com – This website contains practical step-by-step guides to improving your search campaigns and provides regular posts on all things search marketing.

www.searchengineland.com – This blog covers not only search advertising, but the entire spectrum of search engine marketing, providing useful insights for all your search activities.

support.google.com/adwords/?hl=en – This is where you can find information related to Google AdWords and other search advertising concepts.

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11.S: Search advertising(Summary)

Search advertising is advertising on the results pages of search engines where an advertiser typically pays for each click on an advert. These adverts consist of text, links and Ad Extensions. They are listed above and alongside the organic search results, and are marked as adverts so that users are aware that these are paid-for listings.

Search advertising is targeted according to keywords, demographics, behaviour or interest. On search engines, the CPC is determined by an auction.

The success of an advert may be determined by its CTR, but the success of a campaign will be determined by its conversion rate and its ability to achieve a target CPA. After all, it's not enough for users just to click on your adverts, you want them to take specific actions on your site once they get there.

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12: ENGAGE - ONLINE ADVERTISING

Learning Objectives

In this chapter, you will learn:

- The various business objectives you can meet with online advertising.
- All about the various ad formats, payment models and ad types available.
- How and where to publish your adverts.
- How to run an online advertising campaign step by step.

12.1: Introduction

12.2: Key terms and concepts

12.3: Objectives

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12.15: Targeting and optimising

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12.E: Online advertising(Exercises)

12.S: Online advertising(Summary)

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12.1: Introduction

Digital advertising, simply put, is advertising on the Internet. It can be found anywhere you access the web; the majority of this form of advertising is now found on mobile. Also known as online advertising, this is an integrated approach to advertising, focusing on desktop, tablet, and mobile devices. This includes display adverts found on websites, adverts on search engine results pages (covered in the chapter on Search advertising), adverts placed in emails and on social networks, video and content advertising, and other ways in which advertisers use the Internet.

> **Note**
>
> Read more about this in the Search advertising chapter.

The terms 'digital advertising' and 'online advertising' will be used interchangeably in this chapter.

The main objectives of online advertising are to increase sales, improve brand awareness, engage customers, and raise share of voice in the marketplace. It is based on the simple economics of demand and supply. Advertisers aim to stimulate a consumer need (demand) and then satisfy that need (supply).

Online advertising follows web user behaviour. Advertisers want to place their adverts where potential customers will see them. Digital advertising is not limited to one specific medium or location; it can be placed almost anywhere on the web and can consist of images, text, videos, interactive elements, and even games.

Although the Internet provides new scope for creative approaches to advertising, we see its true advantages when we realise how trackable, and therefore measurable, Internet advertising is. It is possible to track all interactions with the advert itself: the number of impressions served, how many clicks it received, post-click AdView data, and how many unique users were reached. This leads to valuable data that can be used to make sensible, effective business decisions.

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12.2: Key terms and concepts

Table 12.2.1

Term	Definition
Ad server	The technology that places ads on websites.
Animated GIF	A GIF (type of image file) which supports animations and allows a separate palette of 256 colours for each frame.
Banner	An online advertisement in the form of a graphic image that appears on a web page, including mobile sites.
Clickthrough rate (CTR)	Clickthrough rate = Clicks / impressions, shown as a % conversion. A visitor completing a target action.
Cost per acquisition (CPA)	Refers to the cost of acquiring a new customer. The advertiser pays only when a desired action is achieved (sometimes called cost per lead).
Cost per click (CPC)	Refers to when an advertiser pays only when their ad is clicked on, giving them a visitor to their site typically from a search engine in pay-per-click search marketing or programmatic CPC buying engines.
Cost per mille/ thousand (CPM)	Amount paid for every 1 000 impressions served of an advertisement.
Display network	Content websites that serve pay-per-click adverts from the same provider, such as AdWords.
Google AdWords	Google's PPC program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
HyperText Markup Language (HTML)	A language read by web browsers. Certain HTML 'tags' are used to structure the information and features within a web page. As an example, HTML emails usually contain graphics and can be interactive.
Internet Protocol (IP) address	The Internet Protocol (IP) address is an exclusive number which is used to represent every single computer in a network.
Internet service provider (ISP)	Internet service provider; this is the company that provides you with access to the Internet, for example, MWEB, Verizon or AT&T
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click of the advert.
Tracking	Measuring the effectiveness of a campaign by collecting and evaluating statistics.
Tracking code	A piece of code that tracks a user's interaction and movement through a website.
Traditional media	Media that is not digitally based or bought through digital metrics, these include TV, print, radio, magazine, activation and out f home (billboards). Digital billboards and activations using digital hologram technology, along with radio ads that integrate mobile technology, are blurring the lines between media.

Unique selling point (USP)	Unique selling point (or proposition) is what makes your offering different to your competitors'.
Web analytics	A software tool that collects data on website users, based on metrics to measure its performance.
Web browser	This is what allows you to browse the World Wide Web. Examples of browsers include Microsoft Edge, Chrome, OperaMini, and Firefox.

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12.3: Objectives

Advertising online has a number of objectives; let's explore these.

Building brand awareness

Making users aware of a brand or product is an important long-term goal for any marketer. Once customers know about it, they are more likely to trust the brand.

The more frequently a brand message is seen, the higher the recall on the brand, advert or tag line. The better known a brand is, the more business it can do; brand awareness drives recall at the point of purchase or when considering a brand to use. Its ultimate goal is to sell more of the product or service.

Note

Brand awareness is essential for launching a new brand or product or approaching a new audience.

It is worth noting that despite low clickthrough rates, online advertising does drive awareness because the ad is seen even if it isn't clicked. This is highly relevant when using programmatic engines to drive affiliate-based marketing tactics. This moves away from the 'old school' CPM buy. Refer to the section on Advertising exchanges and programmatic buying for more context.

Digital advertising is largely visual, making it an ideal channel for promoting brand imagery and making users familiar with its colours, logo and overall feel.



Figure 12.3.1: Banner ads that raise awareness *Adapted From Screenshot, Ster Kinekor Banner Ad, 2017*

Creating demand

Creating customer demand is a three-step process: inform, persuade and remind. Consumers can't want what they don't know about. Advertising needs to convince them that they want something and let them know why they should want it. Online advertising provides a great way to communicate the unique selling points (USPs) of a product, helping to stimulate demand and reminding consumers about the product and why they want it.



Figure 12.3.2: A banner ad that creates demand for a new product *Adapted From Screenshot, Apple iPhone x Ad, 2017*

Satisfying demand

Once consumers want a product, they need to find out how to satisfy that desire. At this point it is important for the marketer to show the consumer how a particular brand or product will best meet that need. Search ads are usually most useful for this (see the Search advertising chapter for more information).

> **Note**
>
> Read more about this in the Search advertising chapter

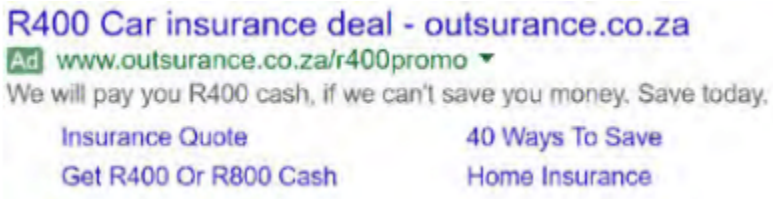


Figure 12.3.3: A search ad that meets the customer's need to save money *Adapted From Screenshot, Google, 2017*

Driving direct response and sales

All forms of digital marketing need to drive traffic and sales in the long term.

However, the immediacy of online advertising also drives traffic and sales in the short and medium terms. Unlike traditional media advertising, online advertising can turn the potential customer into an actual customer right there and then. What's more, it is possible to measure accurately how effective the online advertising campaign has been in this regard.

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12.4: The key differentiator

Online advertising is able to drive instant sales and conversions. Unlike other advertising mediums, the consumer can go from advert to merchant in one easy click. Because of the connected nature of the Internet, online activities are highly trackable and measurable, which makes it possible to target adverts and to track and gauge the efficacy of the advertising accurately. Each advert can be tracked for success.

The long tail of successful tracking also ensures that the user is tracked from the start of their journey to their final purchase, which might not be in the traditional 'awareness to sale' funnel. Google has called this principle 'attribution modelling', and it is based on the premise that a certain digital channel might be better at assisting in purchase than another, at a certain time, in a certain chain of interactions with the brand.

For example, a user might see a display ad for the VW Golf at the beginning of the month, but not click on it. Later in the month, they receive a raise, so they decide to purchase a new car, and the VW Golf comes to mind. They search for it, and click on a Google search ad to see the vehicle on the website and evaluate costs. Then they visit a number of other vehicle websites. A week later, they see an ad on Facebook for the VW Golf on a 2% below prime sale, so they click on it and fill out the lead form for the dealer to call them. This demonstrates how different media played a part in bringing the sale or last click attribution.

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12.5: Types of display adverts

There are many different ways to display adverts in digital. Here are some of the most common options.

Banner adverts

A banner advert is a graphic image or animation displayed on a website for advertising purposes. Static banners are in GIF or JPEG format, but banners can also employ rich media such as video, JavaScript, HTML5 and other interactive technologies; these allow the viewer to interact and transact with the banner. Banners are not limited to the space that they occupy; some banners expand on mouse-over or when clicked. Some can capture data within the banner.

> Note
>
> Google AdWords offers a rich media banner advert builder. You can find it in the 'Ads' tab in the AdWords account interface.

Standard banner sizes

There are standard sizes (measured in pixels) for static, animated and rich media banner adverts. Creating banners in these sizes means the ads can be placed on many websites; advertisers sell space in these sizes as well. And here, size (both dimensions and file size) does matter, you can expect varying rates of clickthroughs and conversions across the range of sizes. Bigger is usually better, but if you want to know what works best for your brand, test.

> Note
>
> Start with the most common banner size.

Banner sizes available on the Google Display Network include (all sizes are in pixels, Width × Height):

- Banner (468 × 60)
- Mobile leaderboard (300 × 50)
- Leaderboard (728 × 90)
- Small square (200 × 200)
- Skyscraper (120 × 600)
- Wide skyscraper (160 × 600)
- Square (250 × 250)
- Medium rectangle (300 × 250)
- Large rectangle (336 × 280).

Banners may be animated, static or Flash, but must be under 150k in file size.

All adverts need to be supplied with a destination URL. Some rich media adverts allow for multiple destination URLs.

Interstitial banners

Interstitial banners are banners shown between pages on a website or, more often, between screens on an app. As you click from one page to another, you are shown this advert before the next page is displayed. Sometimes the advert can be closed.

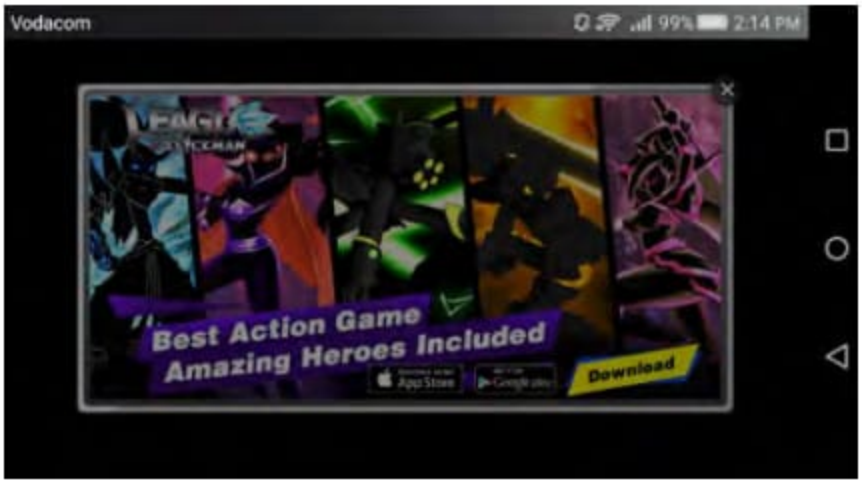


Figure 12.5.1: Interstitial ad between screens on a mobile app *Adapted From Screenshot, App ad, 2017*

> As of 10 January 2017, Google may rank sites lower if they use pop-ups and interstitial ads, since users tend to dislike those ads. This should reduce the number of advertisers using these ad types over time.

Pop-ups and pop-unders

As the name suggests, these are adverts that pop up, or under, the web page being viewed. They open in a new, smaller window. You will see a pop-up straight away, but will probably become aware of a pop-under only after you close your browser window.

These were very prominent in the early days of online advertising, but audience annoyance means that there are now 'pop-up blockers' built into most good web browsers. This can be problematic as sometimes a website will legitimately use a pop-up to display information to the user. Pop-ups still occur now and then on mobile phones or when visiting somewhat unethical sites.

Floating adverts

This advert appears in a layer over the content, but is not in a separate window. Usually, the user can close this advert. In fact, best practice dictates that a prominent close button should be included on the advert, usually in the top right hand corner. Floating adverts are created with DHTML or Flash, and float in a layer above a site's content for a few seconds. Often, the animation ends by disappearing into a banner advert on the page. Many sites these days are using pop-ups to encourage newsletter signups or social media likes rather than to advertise products.

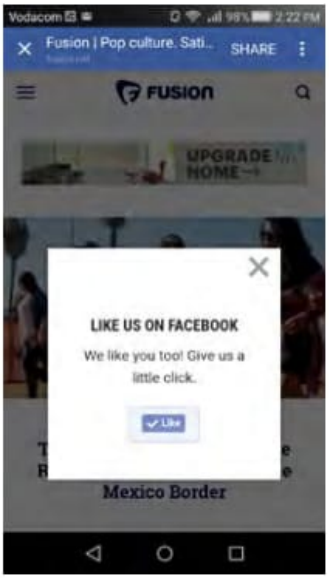


Figure 12.5.2:A floating ad on Fusion.net mobile *Adapted From Screenshot, Fusion mobile pop up ad, 2017*

Note

Remember: your goal is to inform and motivate customers, not annoy them. Floating ads should be engaging and easy to close.

Wallpaper adverts

This advert changes the background of the web page being viewed. It is sometimes possible to click on an advert of this type, but not always. The effect of these adverts is difficult to measure as there is often no clickthrough, and its chief purpose is branding.

Map adverts

This is advertising placed on an online map, such as Google Maps. This type of advert is ideal for local businesses and is usually based on keyword searches for the brand's offering.

Video adverts

This is a video advert in one of the formats shown above. It starts to play on mouse over, or on arriving at a site.

Native content

Native content advertising is the online version of Advertorials. This is where the advertiser produces content that is in line with the editorial style of the site, but is sponsored or in some way product endorsed by the brand; video is an increasingly popular method of native advertising. Great examples of this exist on Buzzfeed.com. More on this later in the Native advertising section.



Figure 12.5.3: Native content from McDonald's *Adapted From Screenshot, McDonalds native ad on Fusion, 2017*

Sponsored Content

Sponsored content advertising exists at the bottom of articles you read online. This is where the 'suggested articles' posts appear and in most cases, this is paid-for promotion. Advertisers pay to have their content promoted under certain categories of sites or articles.

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12.6: Payment Models for Display Advertising

As well as a variety of mediums and formats, there are also a number of different payment models for display advertising.

CPM

CPM stands for cost per thousand impressions (M is the Roman numeral for a thousand). This means the advertiser pays for every thousand times the advert loads on the publisher's page. This is how a campaign is normally priced when brand awareness or exposure is the primary goal.

CPM rates for rich media adverts are usually higher than for standard media adverts. This is often based on file size.

CPC

CPC stands for cost per click. This means that the advertiser pays only when their advert is clicked on, regardless of how many times it has been viewed. CPC advertising is normally associated with search advertising, although it has become very popular in display advertising too, especially when using ad networks. Banners can be priced this way when the aim is to drive traffic and conversions. It is also a payment method sometimes used in affiliate marketing, when the aim is to drive traffic to a new website.

> Note
>
> Read more about this in the Search advertising chapter.

CPA

CPA refers to cost per acquisition. Using this model means that the advertiser pays only when an advert delivers an acquisition after the user clicks on the advert.

Definitions of acquisitions vary depending on the site and campaign. It may be a user filling in a form, downloading a file or buying a product.

CPA is often the best option for advertisers because they pay only when the advertising has met its goal. For this reason, it is also the worst type for the publisher, as they are rewarded only if the advertising is successful. The publisher has to rely on the conversion rate of the advertiser's website, something that the publisher cannot control. The CPA model is not commonly used for banner advertising and is generally associated with affiliate marketing.

Flat rate or sponsorships

Sometimes, owners of lower-traffic sites choose to sell banner space at a flat rate, in other words, at a fixed cost per month, regardless of the amount of traffic or impressions. This would appeal to a media buyer who may be testing an online campaign that targets niche markets. A popular way that this is employed is via a homepage or section takeover, in which a brand can buy a home page takeover on a news portal on the day of a big news event such as a big sports day or an election.

There are several variations to what a sponsorship on a website entails. Examples include exclusive adverts on all the pages and slots on a specific page, newsletter or section, and sponsoring content. Sponsorship means that no other advertiser will appear in that section. Sponsorships are often difficult to measure and are mostly used to raise brand awareness. These can be very effective when launching a new brand.

CPE

With the cost per engagement (CPE) model, advertisers pay for interactions with adverts, normally placed in videos or applications, such as Facebook applications. An interaction, referred to as an engagement, usually starts with a rollover, or mouse-over that expands the ad. An engagement can also be a like, comment, share or other platform-relevant social action.

Once expanded, an advert may contain a video, game, form, or other interactive content. The ad doesn't take the user away from the web page, and marketers pay only when a user completes an action.

What payment model can you expect?

The advertiser rarely has a say over the payment model used. This comes down to the website owner or publisher, advertising type and other factors, such as the popularity of the site. CPM favours the publisher, while CPA favours the advertiser. Sometimes, a hybrid of the two payment models is pursued.

High-traffic, broad-audience websites, often referred to as 'premium' or booked media, will typically offer CPM advertising. Examples include web portals such as www.yahoo.com or news sites such as www.cnn.com.

Niche websites with a targeted audience are more likely to offer CPC or CPA advertising to advertisers with an appropriate product. These can also fall under the umbrella of affiliate marketing.

As programmatic ad exchanges (a way to purchase digital advertising inventory, see below) take over more of the digital inventory, the CPM and sponsorship buying models are starting to wane in popularity for both advertiser and publisher. The accuracy and cost efficiency with which programmatic uses remnant advertising inventory from sites that sell majority CPM inventory make it a popular way to target and buy going forward. This style of buying also allows much better targeting of the advertising over time, a big plus for advertisers. This will soon overtake the traditional CPM buy in 100% of cases.

Types of advertising can be seen on a scale from more intrusive (and thus potentially annoying to the consumer) to less intrusive. In the same way, payment models can be scaled from those that favour the publisher to those that favour the advertiser.

When planning a campaign, it is important to know how the advertising will be paid for and what kinds of advertising are offered by publishers. A lot of this can be solved by using a company that specialises in advert serving, media planning and media buying.

> Which is the best payment model for you? This will depend on the purpose of your ads and the return you expect on your investment. Each payment model can be effective and lucrative if used appropriately.

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12.7: Implementing online advertising

Knowing the various types of display options and payment models available is all very well, but you may be wondering how to put this all together as you plan your campaign. Here is a step-by-step guide that you can follow to ensure that you run effective adverts.

> Don't forget to keep an eye on any non-digital advertising that the brand is doing. This could have a significant effect on your results, and you want to ensure that you are communicating the same message.

Step 1. Determine the goal of your campaign

Are you embarking on a branding campaign, or is your primary focus direct response? Keep your overall channel and brand objectives in mind when planning your digital campaign.

Step 2. Identify your key performance indicators (KPIs)

Which figures will let you know if you are succeeding? This should tie in closely to your goal.

Step 3. Investigate your target audience

What websites are they likely to be visiting? The type of creative you use and the payment model you follow will largely be determined by the websites on which you advertise.

Online advertising is an acquisition and awareness channel. It does not require users to seek an interaction actively, as search advertising and email marketing do. So it is crucial that the adverts are placed in front of the audience that is most likely to convert. Sites such as Effective Measure can help give this type of insight (http://www.effectivemeasure.com/).

Step 4. Research potential publishers to host your adverts

Niche websites with a smaller, more targeted audience will most likely charge a flat rate for display advertising, or a CPA rate. They could be flexible in display options that they offer, but you will need to take into account their bandwidth costs if they serve the adverts.

High-traffic websites with a broad audience will usually charge on a CPM basis. They will broker their advertising inventory through an advertising network, or even a number of advertising networks.

Step 5. Set a budget

Most advertising platforms will let you set and dynamically manage your budget. Decide how much you are willing to pay per click, impression, action or engagement, and set your total budget in line with this.

Step 6. Create your adverts

Now, you will need to brief your creative team to ensure that you have the optimum banners for your campaign. Your online adverts will need to:

- Attract attention
- Convey a message
- Entice action.

Animation attracts attention, but be wary of being one of several animated banners on a website. Banners should not be considered in isolation, but rather in the context of the website on which they will appear.

Web users respond well to being told what to do, and the content of an online advert should be concise and directional. Examples of these CTAs include:

- 'Click for a quote.'
- 'Click here for the full video and win.'
- 'Donate now.'

Step 7. Choose or create a landing page

All advertising needs an appropriate landing page or destination URL. Whether this involves creating a microsite, or merely leading users to an existing page on the website, ensure that clickthroughs are not being wasted. Generally, sending advertising traffic to your home page is not a good idea as it leaves the user confused about where to go next.

Step 8. Run your adverts

Now that you're all set up, you can let your ads go live! Keep a close eye on your spending to ensure that you're getting a decent return for your money, and that nothing unusual is occurring.

> **Note**
>
> If a problem comes up, you can simply stop your campaign, change the creative elements or modify your approach. The beauty of online advertising is that it can be revised almost instantly.

Step 9. Track, measure, optimise

As with all online marketing tactics, you need to track what your ads are doing and the results they are generating, measure your returns and successes, and then optimise your online advertising campaigns to get even better returns in future.

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12.8: The future of online advertising

On the web, the convergence of digital devices and channels is leading to new avenues for online advertising. Digital advertising can reach customers anywhere where they can access the web.

While we have become used to the Internet as a free medium where we can read and interact with any content we want, it is the fact that it is an advertisers' medium that keeps it free. And that means that as technologies evolve and the way we interact with content changes, so advertising follows.

Previously the level of interaction a web user had with a website could be measured by the number of pages of that website the user viewed. Now, technology such as AJAX and rich media such as video mean that the time spent on a web page can be more meaningful than the number of pages viewed. The key word here is 'engagement', and technology and data analysis is working towards being able to determine how websites can quantify the level of engagement with a viewer.

A little online research will reveal plenty of commentary declaring the decline of display advertising. Increasingly, consumers are becoming both weary and wary of advertising. Already low clickthrough rates on banners are dropping, so the effectiveness of display advertising is being questioned by some. However, there is a counterargument to be made here using different types of online advertising. Native advertising, for example, has a fairly good engagement rate. With the focus in digital marketing on tracking and measuring response and engagement, should a company spend money on less measurable activities such as 'brand building', where they are paying on a CPM basis?

> **Note**
>
> View-through conversions are important to look at as well, especially if your campaign is focused on raising awareness

Using third-party ad servers and post-impression tracking, the effects of different advertising and marketing channels on each other can be observed. Banner advertising can see an increase in search volume, for example.

What does this tell us? Measurement should take place across all channels, and no channel should be utilised in isolation. The best results will be gained through an integrated and holistic approach to digital marketing.

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12.9: Advantages and challenges

Advantages of online advertising

Banner advertising goes a long way towards bridging the advertising divide. These adverts have a set size, they can look very similar to print adverts, and they occupy a particular bit of real estate in a publication with a particular number of views. It's easy to understand, and it does the things with which buyers are familiar.

Online advertising can take advantage of the emotive qualities of images, videos and animations. Some campaigns are better suited to images than plain text.

Since banners can contain rich media, they offer levels of interactivity that other forms of advertising cannot achieve. This allows your target market not only to see your banner, but also to play with it. Interaction builds a bond and improves the chances of the consumer remembering your brand tomorrow. Cognitive learning is a powerful outcome of interactive display advertising.

Modern online advertising is able to bring together a number of other online marketing tactics such as animations, games, video and Flash.

Banner ads, like all digital marketing tactics, are measurable. Track clickthrough rates and you get an idea of exactly how many users are responding to your call to action. Some publishers even have the ability to do post-click tracking, which means that you can track the user all the way to a sale if that is the purpose of the advert.

Challenges of online advertising

A lot of display advertising is intrusive, so popup blockers can often prevent adverts from being served as they were intended by the advertisers. There are also extensions available for web browsers, such as AdBlock Plus, that will block advertising on web pages. Technologically savvy consumers are increasingly using these methods to limit the advertising that they see.

> **Note**
>
> Advertising is not a problem that's unique to the web, for example, TV viewers are increasingly skipping ads or watching episodes through online streaming services.

Bandwidth can also be an issue, although this is a shrinking problem. However, campaigns should be planned according to demographics in determining the richness (and investment) of interaction.

Consumers are suffering from advertising fatigue, so while new technologies can provide great results, as soon as the market moves mainstream it can get saturated. Consumers are increasingly ignoring adverts.

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12.10: Measuring success

How you measure the success of an online advertising campaign will depend heavily on the objectives you set for that campaign. For this reason, it is important to set those objectives before the campaign begins. The objective you have in mind will inform the goals you monitor (where “goal” is a specific user action), and that in turn will inform the KPIs you track. You will also want to measure events, or steps in the conversion process.

As an example, if your objective is awareness, you may want to look into the following KPIs, among others:

- Number of visits to your website
- Amount of user engagement (measured by time on site, comments on or shares of a social ad)
- Number of product views
- Number of brochure downloads.

Remember, KPIs are going to differ based on your objectives, so always keep that in mind!

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12.11: Case study - Post-It and Proximity Russia

One-line summary

Post-It and Proximity Russia came up with a banner ad campaign that people actually liked!

The challenge

The major problem with banner ads is that users don't like them. They find display ads annoying and rarely actually engage with them. Retargeting banners are seen as even more invasive. PostIt wanted to create a retargeting banner that users actually wanted to see.

The solution

Post-It created a banner that users could use as Post-It notes. They would click on the banner, type a note to themselves, and then retargeting technology would show them their own Post-It notes instead of retargeting banners.

This involved using the same technology other websites use for retargeting, as well as choosing placements for their ads on the most commonly used websites so that users would see their PostIt stickers wherever they visited.

Clicking on a note brought users to a Post-It page where they could manage their stickers, create new ones, or delete all of them.

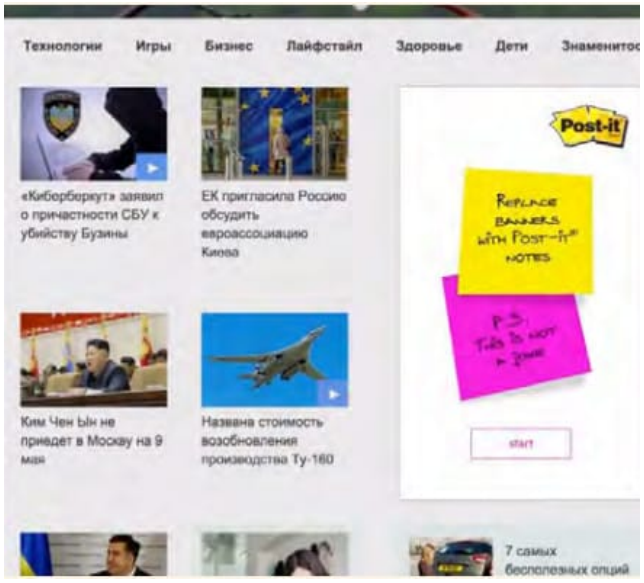


Figure 12.11.1: A banner ad made of Post-It notes *Adapted From Adweek, 2015*

Results

Users engaged with this campaign happily. It received:

- 47.6% active engagement
- 152.40 seconds average interaction time
- Considerable earned media reach, including users asking for the same campaign to be brought to other countries.

(Webby Awards, 2016)

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12.12: The bigger picture

Offline advertising and marketing campaigns can be adapted for an online audience in order to ensure maximum brand exposure. It is very effective in enhancing offline marketing and advertising activity and in ensuring a wider reach.

As mentioned, online advertising can be used as an acquisition channel, reaching out to a new audience. It can be used to initiate a buying cycle and customer relationship, which then plays out across other online channels. Addressing advertising and other channels to complement each other will result in a consistent message, and optimum results. Online advertising can be used to reach a large audience, and then other digital marketing tactics can be used to refine and engage this audience further. Social media advertising in particular is crucial for building communities and keeping the brand top of mind.

Online advertising and affiliate marketing go hand in hand. Affiliate networks also act as advertising networks, allowing for advertising to be purchased on a performance basis.

When seeding new products and viral campaigns, which are shared by many users on social media, display advertising can be used to reach a wide audience at a low cost. It can expose a campaign to many new users, and increase the chance that those who are most likely to pass on a message receive it in the first place. Display advertising also supports other advertising and marketing channels, such as search advertising and marketing.

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12.13: References

Webby Awards, 2016. The Banner That Makes You Like Banners. [Online] Available at: http://webbyawards.com/winners/2016/...u-like-banners [Accessed 1 November 2017]

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12.14: Getting your ads online

To get your ads to appear online, you need to find and pay for the space where they will appear. There are several options for doing this:

- Premium booked media
- Advertising networks
- Advertising exchanges and programmatic buying
- Social media advertising placement (see more in the Social media advertising chapter)
- Native advertising
- Mobile advertising
- Ad servers.

Premium booked media

Premium booked media works very much in the traditional way of booking advertising; the advertiser contacts the premium media provider (usually a single group that oversees a key, high-profile online space) and discusses options for placing an advert. This will involve negotiating on targeting and pricing for the space desired, and is usually a costly but high-profile option.

Advertising networks

An advertising network is a group of websites on which adverts can be purchased through a single sales entity. It could be a collection of sites owned by the same publisher, for example, New Line Cinema, Time Inc. and HBO are all owned by Time Warner Inc., or it could be an affiliation of sites that share a representative.

The Google Display Network is one of the largest advertising networks in the world.



Figure 12.14.1: Ad formats available on the Google Display Network (not including rich media ads) *Adapted From Blu Mint Digital, 2017*

The advertising network acts as an intermediary between advertisers and publishers, and provides a technology solution to both. As well as providing a centralised ad server that can serve adverts to a number of websites, the networks offer tracking and reporting, as well as targeting.

Advertising networks can categorise the sites by factors such as demographics, topic, or area of interest. Audience targeting is a particularly useful option, in which an ad can be targeted according to remarketing lists, custom lists, or interest categories. Advertisers pay to advertise in specific channels, and not in individual sites. Usually, the campaign will then be optimised based on the best converting sites or on the objectives of the campaign. Rates are often negotiated with the network, and placements are booked over a period of time.

Advertising exchanges and programmatic buying

Advertising exchanges, on the other hand, are where unsold advertising space, called inventory is placed by publishers for bidding. The inventory is sold to the highest bidding advertiser. Giving advertisers far more control, this type of advertising mimics the PPC model of search advertising (GSP auction) but bids are for audience profiles and space rather than for keywords. It allows publishers to fill unsold inventory at the highest available price, and can give smaller advertisers access to this inventory.

Programmatic buying is the automated purchasing of digital advertising space using software. This is much more efficient than the old process of human ad buyers and salespeople, and thus it is also cheaper. Programmatic buying can happen in advance from specific publisher sites, or in real time bidding. Real time bidding is one kind of programmatic ad buying in which ads are bought on a per-impression basis through real time instantaneous auctions.

Programmatic is exciting because it makes targeting much easier. It uses small predictive analysis to present your ads to the most likely optimal target market, and then evolves from there based on what is working best. This frees marketers up to focus on KPIs, creative, strategy, and other aspects.

Social media advertising

> **Note**
>
> Read more about this in the Social media advertising chapter.

Many social media platforms offer an advertising option, as this is their primary source of revenue. Social media can be an excellent place to reach prospects because you can usually target very accurately based on user-provided demographic information.

Native advertising

Native advertising is presenting advertising in a way that matches the platform on which it is presented and that meets audience expectations for that platform. It is an indirect promotion of the brand or product in that it is primarily focused on providing value to a specific readership, but it differs from content marketing in that it is paid. Essentially, it is paid advertising that works very hard not to disrupt the user experience. In its ideal form, this means the user is presented with useful, engaging content, which in turn is much more engaging than a banner ad.

It can look like paid search ads on a search engine, sponsored content like on LinkedIn or Facebook, or promoted listings, like on Twitter. However, it looks much more like content than advertising.

Mobile advertising

Mobile advertising is no longer something that should be considered in isolation. While there are still mobile-online networks, online advertising is moving toward real time buying and networks, and so device is becoming just another targeting option. All of the ad options already discussed are also available on mobile.

Blind networks

These networks target a large number of independent mobile publishers, and generally allow you to target by country or type of content, but not by specific websites. Payment tends to be on a CPC basis, which can vary. An example of this kind of network is mob ads (www.mobads.com). Very few low-cost blind networks exist these days, as they have all been bought up by programmatic engines.

Premium blind networks

Advertising on premium blind networks tends to be more expensive but allow the advertiser to target better-known brands and high-traffic sites. Broadcasters or operator portals fall under this category. Payment here is often on a CPM basis. Millennial Media (www.millennialmedia.com) is an example premium blind network. While targeting options are available, different networks can work in different ways, with varying levels of support.

Premium networks

These networks often offer sales as a direct extension of the big brands that they offer. More detailed targeting and sales support

is available, but they also charge higher rates. They also offer different ad bidding options such as CPC and CPView for video ads. An example of this kind of network is Widespace (www.widespace.com).

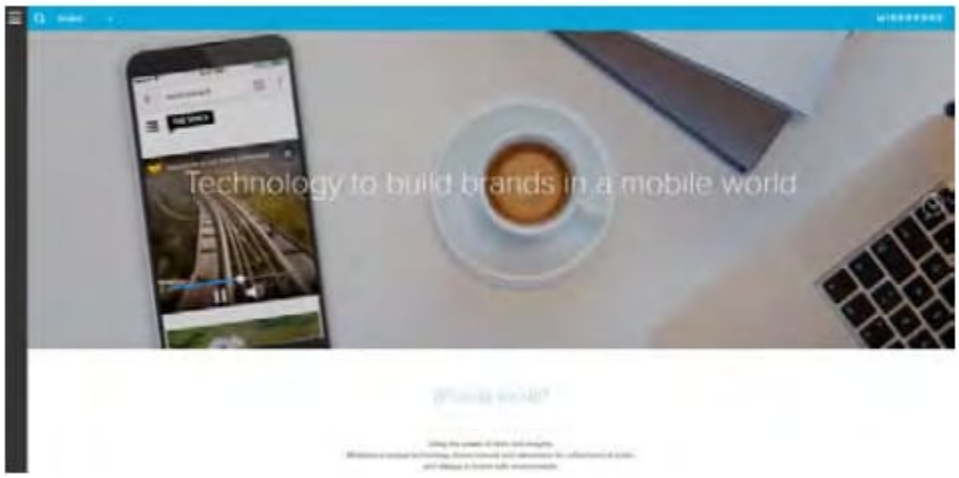


Figure 12.14.2: Widespace is an example of a premium mobile ad network *Adapted From Screenshot, Widespace, 2017*

Gaming console advertising

> **Note**
>
> The IAB has some guidelines for responsive creative that you can find at https://www.iab.com/ newadportfolio/

Of course, a phone isn't the only kind of mobile device. Internet-connected game consoles are also classified as mobile devices, and they also allow for advertising. Consoles like the Xbox One can replace a cable box, DVD player, stereo, and older gaming consoles, so users of all ages and demographics could find them appealing.

Ad servers

Ad servers are servers that store advertisements and serve them to web pages. Ad servers can be local, run by a publisher to serve adverts to websites on the publisher's domain, or they can be third-party ad servers, which serve adverts to web pages on any domain. Ad servers facilitate advert trafficking and provide reports on advert performance. They have two functions: to help publishers manage their ad inventory, and to help advertisers monitor and optimise their campaigns.

The benefits of ad servers

Rather than distribute copies of each piece of creative advertising to each publisher or media buyer, you can send out a line of code that calls up an advertisement directly from the ad server each time an advert is scheduled to run. The agency loads the creative to the server once and can modify rotations or add new units on the fly without needing to re-contact the vendors. This is referred to as third-party ad serving.

The ad servers provide a wealth of data, including impressions served, adverts clicked, CTR and CPC. While publishers have their own ad servers, most of the third-party ad servers also have the ability to provide performance against postclick activities such as sales, leads, downloads, or any other site-based action the advertiser may want to measure.

Ad servers provide a consistent counting methodology across the entire campaign enabling the advertiser to gain an 'apples to apples' comparison of performance across the entire media schedule, which includes multiple websites. This ensures that the advertiser gets what they are paying for, and avoids fraudulent activities, such as click fraud, as a good third-party ad server should be audited.

The ad server also allows sophisticated targeting of display advertising. Examples of third-party ad servers include Google

DoubleClick and Sizmek. It is generally accepted practice to run one of these ad servers, but they all cost a percentage of the CPM rates.

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12.15: Targeting and optimising

Ad servers serve adverts across a number of websites, and can track a user visiting websites using cookies or IP addresses. This means that ad servers can offer advertisers:

- **Frequency capping:** This limits the number of times a specific user sees the same advert in a set time period.
- **Sequencing:** This ensures that a user sees adverts in a particular order.
- **Exclusivity:** This ensures that adverts from direct competitors are not shown on the same page.
- **Roadblocks:** This allows an advertiser to own 100% of the advertising inventory on a page.

The ad server can also target adverts based on the business rules of the advertiser or the profiles of the users:

- **Geo-targeting:** Online advertising has the ability to target markets by country, province or city, and can even drill them down to something as specific as their IP address. This is also known as IP targeting. Network or browser type; in this case markets can further be targeted via networks or browser types such as Mozilla Firefox, Internet Explorer, Chrome and Safari.

> Note
>
> Location targeting can be very cost-effective for physical events and regional offers.

- **Connection type:** Users can be segmented and targeted according to their Internet connection type, for example, whether they use broadband or dialup connections.
- **Day and time:** Advertisers can choose the time of day or day of the week when their adverts are shown. Advertisers can specify when their campaign should flight, down to the minute. This usually depends on the client's objective for the campaign or the product itself.
- **Social serving:** Websites gather demographic data about users and then serve each user targeted and relevant advertising. For example, Facebook will allow advertisers to select specific characteristics of users who will be shown an advert.
- **Audience targeting:** The ad server uses the profile of a user, built up over websites visited previously, to determine which adverts to show during a given visit. Ad servers can base this profile on cookies or on IP addresses. For example, the ad server may choose to show adverts for pet insurance on a news page to a user who has visited the pets and animals section of a general media site previously.

Remarketing is another form of audience targeting. This allows the ad server to display ads to users after they have interacted with a website in a certain way, for example, by adding an item to their cart on an eCommerce page but not checking out. The user may then see an ad for the product they have in their cart, to encourage them to go back and make a purchase. This can be done through various engines, the most popular of which is DoubleClick Digital Marketing (DDM) from Google.

> Note
>
> You can find out more about DoubleClick Marketing at: https:// www.thinkwithgoogle. com/intl/en-154/ products/doubleclick

Another approach to audience targeting is to set up parameters to determine when a certain advert needs to be shown. For example, if the user has clicked on a banner advertising a test drive, and the user has actually booked the test drive, the next time they see an advert from the advertiser, a different advert will be shown because the user has already responded to the first one.

- **Contextual advertising**: The ad server deduces the optimum adverts to serve based on the content of the page. For example, on an article about mountain bike holidays in Europe, the ad server would show adverts for new mountain bikes, or adverts from travel companies offering flights to Europe, or perhaps adverts for adventure travel insurance.

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12.16: Tracking

The trackability of online advertising is what makes it so superior to conventional advertising. Not only can an advertiser tell how many times an advert has been seen (impressions), but also how many times the advert has been successful in sending visitors to the advertised website (clicks). As discussed in the chapter on conversion optimisation, the tracking needs to continue on the website to determine how successful the advert has been in creating more revenue for the website (conversions).

> **Note**
>
> Read more about this in the Conversion optimisation chapter.

As well as tracking adverts, advertising networks can also provide information about the users who saw the advert, as well as those who acted on it, including:

- Connection type
- Browser
- Operating system
- Time of day
- Internet service provider.

Many third-party ad servers will set a cookie on impression of an advert, not only on clickthrough, so it is possible to track conversions that happen indirectly (called view-through conversions). Simply put, third-party ad servers can track not only the post click data, but also the post view data; when a user sees an advert, does not click on it, but goes to the website after viewing the advert either by typing in the URL, or by searching for the site.

Using this information, the ad server can target the adverts displayed, helping advertisers to optimise campaigns and get the most from their budgets.

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12.E: Online advertising(Exercises)

Case study questions

1. Why did users find this banner ad campaign so engaging?
2. Which elements of best practice did Proximity Russia follow?
3. How did understanding the audience play a role in this campaign?

Chapter questions

1. Online banner advertising and outdoor display advertising both use images to try to increase sales. In planning, both need to consider placement so as to be seen by their most likely audience. What are the key differences?
2. Is display advertising an effective acquisition channel? Why or why not?
3. Go to www.thetimes.co.uk and www.forbes.com. What advertising can you find on the front page of these two websites? What products are being advertised, and how are they being advertised? What can you deduce about the target market for these products?

Further reading

www.adrants.com – Commentary on online advertising campaigns. US focused. econsultancy.com/uk/blog – UK industry-focused advertising articles.

www.bannerblog.com.au – Have a look at BannerBlog for rich media examples.

https://blog.optimizely.com/tag/display-advertising/ – Optimizely's Display Advertising section, with articles on best practice and case studies.

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12.S: Online advertising(Summary)

Online advertising has two main objectives:

- Branding
- Direct response, engagement and sales.

The Internet allows for highly targeted and highly trackable advertising across a variety of online media. Some ways that advertisers can use the Internet are:

- Banner adverts
- Interstitial banners
- Popups and pop-unders
- Floating adverts
- Wallpaper adverts
- Map adverts.

Ad servers provide trafficking, tracking and reporting solutions to both advertisers and publishers. They allow advertisers to target display adverts based on parameters, including: User profile (location, operating system, browser, connection type)

- Behaviour
- Frequency and sequencing
- Exclusivity
- Context of content.

Technology allows for increased levels of interaction within an advert, and for advertising tailored to engagement media such as online videos and social network applications.

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13: ENGAGE - SOCIAL MEDIA ADVERTISING

Learning Objectives

In this chapter, you will learn:

- How to use social media advertising as part of your complete paid, earned and owned strategy.
- How to create and place effective social media ads for a number of platforms.
- How to use the available targeting options to reach consumers at the right time and in the right place.
- How to approach measuring the effectiveness of social media advertising.

13.1: Introduction

13.2: Key terms and concepts

13.3: Understanding social media advertising

13.4: Core principles

13.5: Implementing social media advertising

13.6: Advantages and challenges

13.7: The bigger picture

13.8: References

13.9: Measuring success

13.10: Tools of the trade

13.11: Case study - Kraft Mac and Cheese

13.E: Social media advertising(Exercises)

13.S: Social media advertising(Summary)

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13.1: Introduction

Social media first became a choice for marketers back in 2005, when Facebook launched its first advertising option. The medium has advanced in leaps and bounds since then, offering a reasonably low cost ad option to marketers, as well as the opportunity to reach a wide audience for little money as long as the ads are engaging enough.

Social media ads can be recognised by labels such as ‘suggested post’, ‘promoted pin’ and so on, depending on the platform. The ad formats available are continuously evolving, which means that marketers need to keep up with what’s available to them, and that there are ever-increasing opportunities to reach your consumers on a platform and in a format that suits them.

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13.2: Key terms and concepts

Table 13.2.1

Term	Definition
Ad Types	The kind of ads you can create on social media; these could be Twitter Cards, Facebook sponsored posts or, Lenses or Geofilters on Snapchat.
Demographics	Statistical information about a particular population, such as age, gender, language or location.
Hashtags	A word preceded by a hash, such as #nofilter, used to help users find posts related to their interests.
KPI	Key performance indicator, important metrics that can be measured to indicate success.
Objectives	What you want to achieve from a marketing effort.
Payment models	The various ways available to pay for ads online, such as cost per click (CPC), cost per engagement (CPE), and cost per mille meaning cost per thousand views, (CPM).
Platform	A single social media network, such as Facebook, Instagram, or WeChat
Promoted content	Content (posts) that extends its reach via paid-for advertising/ promotion.
Social media ROI	The return on investment on social media, difficult to measure straightforwardly, but important to track.
Targeting options	The options available for ensuring that ads reach the right users at the right time.

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13.3: Understanding social media advertising

Social media advertising should be considered as part of an overall social media effort. While brands can start a Facebook page and share engaging posts, those posts would be seen only by a fraction of the possible audience. Even if they have already liked your page. Paying to promote your posts is necessary to ensure that you reach a much larger percentage of your target audience.

Social media advertising is a form of online advertising that takes place on social media networks. Many platforms offer extraordinarily detailed targeting options that match users whom advertisers have identified as belonging to specific purchasing groups, making it a great way to reach exactly the right group of users with your ads.

While more traditional forms of advertising are arguably somewhat inefficient, the targeting offered by social media platforms make it stand out even from other forms of online advertising, such as search or display ads. Social also tends to have higher clickthrough and engagement rates at a lower cost (Hootsuite, 2015).

While it is possible to use social media advertising without considering any other aspect of your digital marketing strategy, it should be considered holistically. The Social media strategy chapter discusses how social media in general can fit into other channels. Social media advertising can be used to:

- Draw attention to products and drive sales
- Drive traffic to websites and other online properties
- Encourage foot traffic
- Encourage other activities offline.

Used well, given the targeting options and access to consumers it offers, social media should be an essential part of any paid media campaign.

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13.4: Core principles

Social media consists of a vast number of different platforms, most of which have different rules for what will and will not work well as an advertisement. However, there are some general principles that govern social media advertising as a whole.

General guidelines

First, remember that 80% of social media time takes place on mobile devices (comScore, 2016). This means that any ad you create for social media is highly likely to be viewed on mobile so you need to make sure that it will look good on that device. Test your posts on mobile devices before you pay to promote them. Consider:

- Images should be clear and convey meaning even when small.
- Text should be brief enough to minimise the need for scrolling.
- The point of the ad should come across immediately with a clear CTA.
- Any links in the ad should lead to mobile-optimised landing pages.

Second, most content on social media is user-generated so if you're creating paid ads, you need to match the rules of the platform you're on and generate content that fits what users of that platform will expect. Make sure you understand the platform before you start advertising on it.

Example 13.4.1

As an example of matching content to platform, take a look at Denny's, an American restaurant chain, on Tumblr.



Figure 13.4.1: Denny's Tumblr account matches the light, quirky tone preferred by Tumblr users *Adapted From Content Marketing Institute, 2016*

Compare their tone on Tumblr to their tone on Facebook, which, while still informal and friendly, is much more in line with the slightly more professional feel expected by users of that platform.



Figure 13.4.2: Denny's Facebook posts, note how good these would look on mobile! *Adapted From Screenshot, Facebook, 2017*

Similarly, compare Wendy's, an American fast-food chain, tone on Twitter to their tone on Facebook.



Figure 13.4.3: Wendy's tone responding to customers on Twitter compared to Facebook *Adapted From Screenshots, Facebook and Twitter, 2017*

> While promoted ads aren't the same thing as responding to customers, the same principle applies: fit your tone and content to the platform. On Facebook, because reading the audience can be a little difficult, because their audience is so broad, a more neutral, but still brand-relevant, tone is best. On other platforms, because you can see more about the users you are speaking to, it can be easier to adapt your tone to them. Remember, though, that your tone should also be informed by your brand identity and overarching strategy.

Third, use your regular, unpaid posts to test out your paid ads. Make sure that you use effective social media copy in every post. Keep your copy short and to the point, with a clear call to action that tells the reader exactly what to do next, and give them a reason to click or carry out the CTA. Then, track which posts are being liked, shared, or commented on, those should be your first choice for paid promotion. The feedback you get on posts is often near-instantaneous, so this will allow you to respond quickly to whichever posts are doing well and which are doing badly. Facebook Ads Manager can help you do A/B testing by putting equal funds behind two different posts. The one that gets a better initial response gets the rest of the funds.

Fourth, rotate ads often. Social media users expect fresh content; they should not be seeing the same ad multiple times over multiple days, so rotate ads every three to five days (Hootsuite, 2016a). The general rule is that a user should see an ad a maximum of four times.

Payment models

> **Note**
>
> Read more about payment models in the Online advertising chapter.

You should be familiar with the various payment models available from the Online advertising chapter.

The most likely payment models you will encounter on social media include:

- CPC (Cost per click, pay only when the ad is clicked on)
- CPE (Cost per engagement, pay only for demonstrated engagement with the ad)

> **Note**
>
> You can learn more about Facebook's oCPM bidding here: blog. adstage.io/2014/06/16/ learn-about-facebookocpm-bidding.

- CPM (Cost per thousand impressions)
- oCPM (Optimised cost per mille, Facebook's flexible ad bid type, where bids can be adjusted based on the goals the advertiser hopes to achieve).

Other payment models will be encountered on other platforms, for example, Pinterest uses an auction bid model for its CPM. Users set a maximum price, but are only charged the amount needed to top the second-highest bidder. They are then charged per thousand views. As another example, a lot of specialised paid media on Twitter is done via third parties like Ad Dynamo and can require high budgets and one-off costs rather than being cost per view or engagement.

Platforms

One of the core principles to keep in mind when choosing a social media platform on which to advertise is that you need to go where your audience is. Be sure to choose a platform that fits your needs as a business as well. Let's take a look at a few of the most popular platforms to see what they can offer and why you might want to focus your attention on them. Note that the demographic statistics given are for the US. As you read, keep in mind that for most networks, the number of older users is increasing which can lead to changes in the behaviour of younger users on the platform or even drive them off entirely.

Note

Learn more about the popular platforms in the Social media platforms chapter.

Facebook

What they offer: Facebook offers a wide array of targeting options and the biggest social media audience in the world, with 1.79 billion users as of the third quarter of 2016 (Statista, 2016). Ad formats are based on desired objectives (which we will discuss in the next section). Their pricing can vary significantly based on a number of factors, but their ad platform is fairly intuitive, and Facebook Analytics gives you a lot of information you can use to optimise ad performance.

You will have access to Facebook Ads Manager, which allows you to manage campaigns, ad sets, and individual ads. This is also available as an app.

Who uses it: 83% of female-identified and 75% of male-identified Internet users use Facebook. The demographics are skewed toward the youth market, with 88% of 18 to 29-year-olds, 84% of 30 to 49-year-olds, and 62% of online users aged 65 and up using the platform 82% of users have some form of higher education (Sprout Social, 2017).



Figure 13.4.4: Facebook user demographics *Adapted From Sprout social, 2017*

Best suited to: Every business should have a Facebook page, as it is the bare minimum of what users expect. Your business should be on Facebook even if it is just listed with an address, website, and other basic details. Whether a business should use paid advertising to promote posts depends on what it wants to achieve, but if you plan to use social media advertising at all, you should consider starting on Facebook.

Instagram

What they offer: Instagram offers photo, video and carousel ads in a number of formats. Because it is owned by Facebook, it has many of the same features, including analytics (through Facebook Ads Manager), good targeting options, and various objectives to drive campaigns. Instagram stories is also a powerful feature, which is mentioned in the Social media platforms chapter. Finally, Instagram is potentially the best platform at the moment to work with influencers. It has a very tight community culture with a focus on quality, unique content and creativity.

Who uses it: More women use Instagram than men, and more people in urban areas use it than in rural areas. Income is split fairly evenly among various income brackets, with 38% of users earning more than US $75 000 annually active on the platform. The important thing to note for Instagram is age, 59% of users between 18 and 29 use Instagram, compared to only 8% above 65 (Sprout Social, 2017).

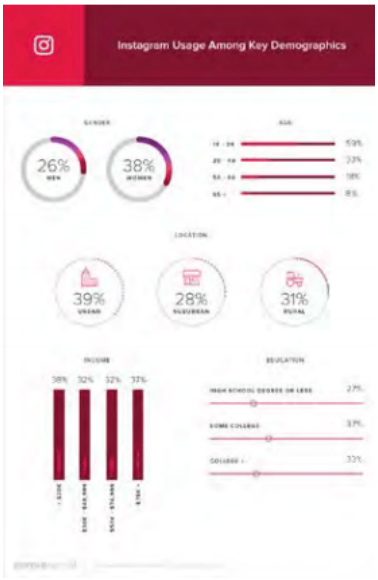


Figure 13.4.5: Instagram user demographics *Adapted From Sprout social, 2017*

Best suited to: In theory, any business can use Instagram. The key attraction for Instagram is visually attractive pictures and videos, so businesses that lend themselves to visuals like this, such as food, decoration, or travel-related brands, will have an advantage, but any business that wants to capture that all-important 18–24 year-old demographic should be active here.

Twitter

What they offer: Twitter offers ad campaigns based on objectives, much like Facebook and Instagram, and the kind of targeting you would expect from a major social media platform. Many marketers point out that advertising on Twitter is a problem because the ads are expensive, the targeting is not as good as Facebook's, and user growth has stalled, but pay-per-click (PPC) on Twitter can be cheaper than other options.

> Note
>
> Read more about payment models such as PPC in the Online advertising and Search advertising chapters.

Followers earned from a Twitter campaign tend to be fairly qualified prospects. They will have been chosen to see your tweets based on how well they fit your targeting profile, and they then choose to follow you based on how well your tweet speaks to their needs.

Who uses it: Twitters users are also skewed towards the youth market, 36% of adults aged 18 to 29, but only 10% of adults over 65, use it. And there is an equal percentage of men and women active on the platform. For location, 77% of Twitter accounts are from outside the US, with a fairly even distribution across urban, suburban and rural areas. Like Facebook, college graduates make up the largest audience for Twitter, 54% have some tertiary education or have graduated college. The income demographics are very similar to Instagram, with 30% of adults who earn more than US $75 000 a year using Twitter (Sprout Social, 2017).

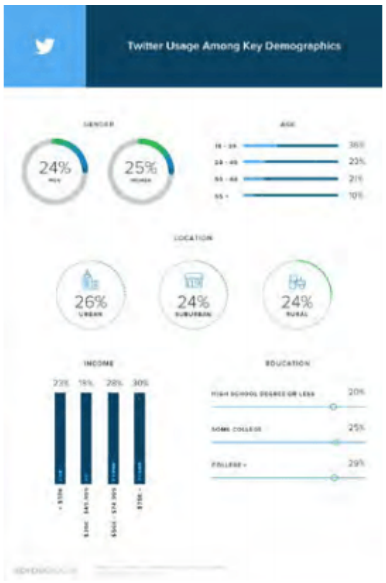


Figure 13.4.6: Twitter user demographics *Adapted From Sprout social, 2017*

Best suited to: Any business that wants to reach an audience like the one described. Twitter audiences are used to instant gratification, Twitter feuds (check out the hashtag #cuteanimaltweetoff for a good example of this), and snappy comebacks. Twitter is a highly politicised space, so any slip-ups or faux pas on the part of your brand will be quickly picked up.

LinkedIn

What they offer: Most social media sites offer good targeting options, but in keeping with its position as a social network for business professionals, LinkedIn's targeting options involve someone's professional abilities. It also tends to convert well on gated content that requires users to enter an email address or other information to download something.

Who uses it: Until 2017, LinkedIn was one of the few social networks that didn't skew toward 18–29 year olds, however this shifted in 2017.

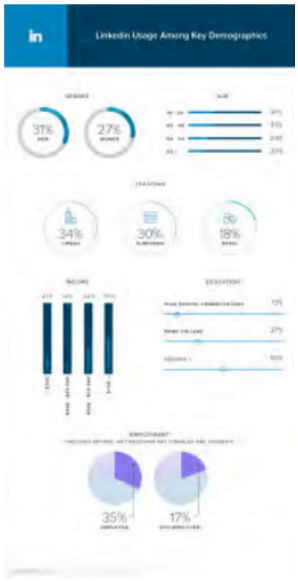


Figure 13.4.7: LinkedIn user demographics *Adapted From Sprout social, 2017*

LinkedIn is used by:

- 34% of adults 18–29

- 33% of adults 30–49
- 24% of adults 50–64
- 21% of adults over 65.

More men than women use LinkedIn, 31% to 27%. On the LinkedIn press page, you can see a map of all their users.

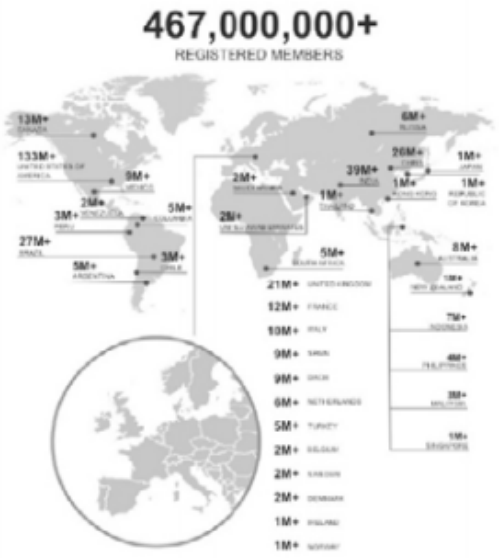


Figure 13.4.8: LinkedIn's user locations *Adapted From Sprout social, 2017*

LinkedIn is even more focused on users with some tertiary experience, 50% of adult college graduates and 27% of adults with some college experience use it. Higher levels of users are high earners, with 45% of adults making over US $75 000 using the platform (Sprout Social, 2017).

Best suited to: B2B marketers who want to target business professionals should start with LinkedIn, and companies that hire a lot of people.

Pinterest

What they offer: Pinterest doesn't offer as many targeting options as some other social media platforms, but it still has basic location, device, gender, and language targeting. Users often visit Pinterest specifically to gather information about and plan potential purchases, and those who view ads on Pinterest tend to have greater awareness and purchase intent than those who do not.

Who uses it: Pinterest is a great platform for targeting women. 45% of women use it, while only 17% of men do. It is again skewed toward the younger market, with 36% of adults 18–29 using it, dropping steadily as age increases. Only 16% of adults aged 65+ use the platform. Pinterest is most popular in suburban areas, 34% of people living in suburban areas use it, while 30% of urban users are active. Like many social media platforms, its users tend to have at least some tertiary education (Sprout Social, 2017).

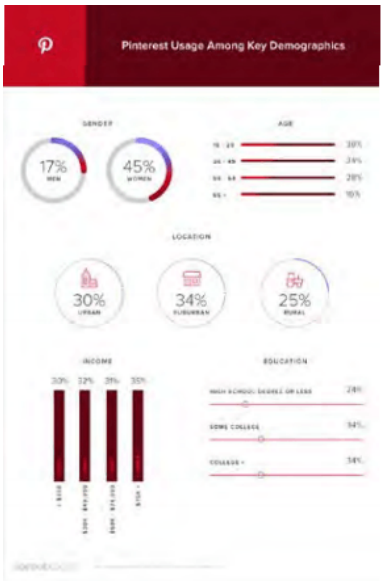


Figure 13.4.9: Pinterest user demographics *Adapted From Sprout social, 2017*

Best suited to: Retailers tend to make the most use of this platform, though other businesses can create successful accounts as well. The key is to create beautiful, useful boards that people want to look at, and use advertising to capitalise on that.

Snapchat

What they offer: Snapchat is one of the newer major social networks, but it has come a long way since its origin as a niche platform mostly used by teenagers. It still has a lot of pull with young demographics, and it encourages real-time content creation and consumption, with users paying more attention to content. Most video snaps are watched with audio on, which differs greatly from Facebook, and Snapchat has an engagement rate five times higher than the average clickthrough rate for other platforms (Wallaroo Media, 2017). Facebook, Instagram and WhatsApp have been fairly blatant about stealing Snapchat's features, including Stories and Filters, which could mean a drop-off in users over time. However, Snapchat is fighting back with new offerings such as Lenses.

Who uses it: Snapchat is dominated by younger users, with 60% of users under 25. About 23% of users haven't yet graduated from high school. Only about 12% of users are aged 35 to 54, with a mere 2% of users aged 65+. However, this is changing, more than half of new users signing up to Snapchat are over 25. Snapchat doesn't publish gender information for its users, but in 2013, about 70% of users were women, and a survey from 2015 showed that more women than men use the platform (Hootsuite, 2016b). The highest penetration rate for Snapchat is in Ireland, then Saudi Arabia and Sweden. College students are more likely to have Snapchat accounts than other demographic groups.

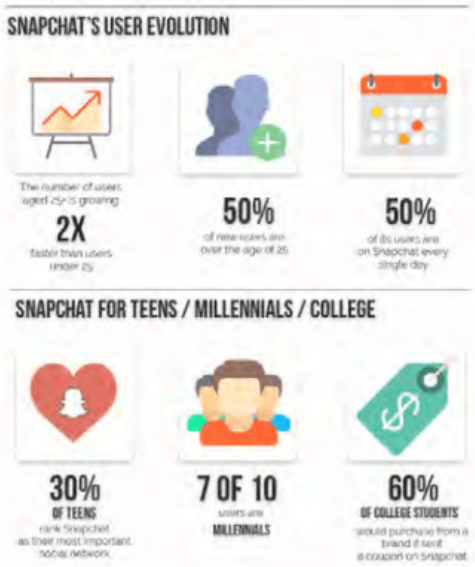


Figure 13.4.10: Some Snapchat user statistics *Adapted From Mediakix, 2016*

Best suited to: Snapchat has fewer options for small businesses than most other social media platforms simply because their options are expensive. Prices have come down, however, with cheapest option, the Sponsored Local Geofilters ad, coming in at as little as US $5. This means that, while the bigger options are still only available to big businesses, other options are available to almost anyone. This means that Snapchat is suited to any business that wants to find a particularly young audience.

Yelp

What they offer: Yelp is a review site that helps users select a business that suits their needs. There are many sites similar to Yelp, so keep in mind that you may want to choose a different option that is more active in your area. Tracking leads generated by Yelp can be difficult, but it does provide some metrics like page views and ad clicks. With users relying more and more on reviews and review sites when choosing where to buy, platforms like Yelp are increasingly attractive.

Who uses it: Men use Yelp more than women, and women are 50% less likely to leave a review if they use the site regularly. People in urban areas are twice as likely as those in rural or suburban areas to use Yelp to choose a business. Yelp users are active on mobile, with 71% of searches on the platform originating from mobile devices worldwide. The largest age demographic for Yelp users is 18–34, which accounts for almost 42% of Yelp users. Most users, 60%, have at least some college education, and 38% of users have an annual household income of at least US $100 000 (Gaille, 2015).

Best suited to: Yelp works best for location-based businesses. That said, many advertisers argue that advertising on Yelp may not be worth the money compared to a free profile so weigh your options carefully.

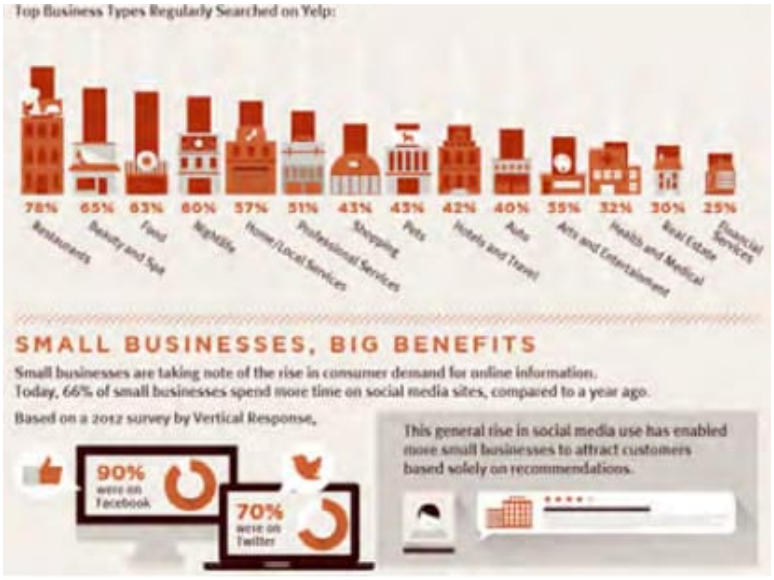


Figure 13.4.11: Excerpt from “How Yelp Can Help”, an infographic from Merchant Warehouse *Adapted From Brandon [Gaille], 2015*

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13.5: Implementing social media advertising

Each platform has its own objectives, ad types, and targeting options. In this section, we will examine a few of the most popular ones.

Facebook

We have already looked at what kind of audience can be found on Facebook and the broad strokes of what they offer.

Objectives

Facebook offers several paid-for advertising solutions based on the action the advertiser wants the audience to take, the purpose of the ads. The core objectives are awareness, consideration, or conversions, which Facebook has broken down further into more specific objectives on which you can base your ad creation.

- **Awareness**
  - Brand awareness
  - Local awareness (promoting to users nearby)
  - Reach (show your ad to the maximum possible number of users).
- **Consideration**
  - Traffic (sending users to your website or app)
  - App installs
  - Engagement (encourage comments, page likes, shares, event responses, and offer claims)
  - Video views
  - Lead generation (collect lead information from interested parties).
- **Conversion**
  - Conversions (encourage valuable actions on your website or app)
  - Product catalogue sales (create ads that automatically show products from your catalogue based on your target audience)
  - Store visits (promote multiple business locations to users nearby) (Facebook, 2017).

The ad format you choose will match your advertising objective.

Ad types

Once you have chosen an objective, Facebook offers a set number of ad formats to choose from that will help you meet that objective. Those formats are:

- Single image
- Single Video
- Carousel
- Slideshow (video-like ads)
- Dynamic ads
- Lead ads
- Boosted posts and promoted posts
- Collection
- Messenger ads
- Canvas (an ad type that offers different components in various configurations to tell a brand story).

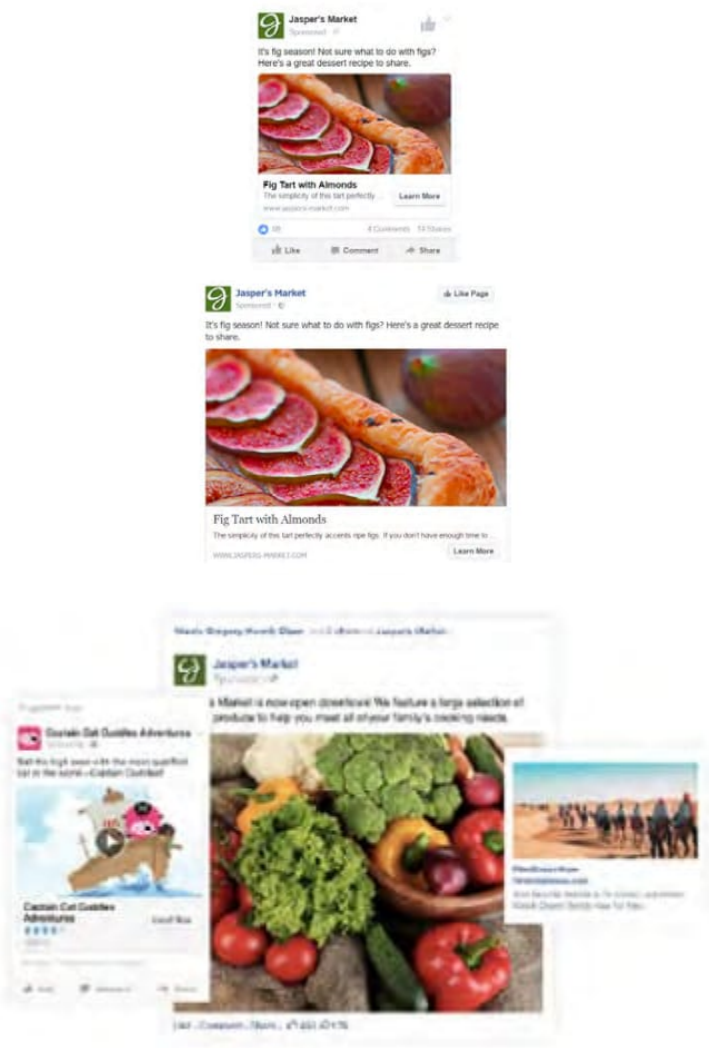


Figure 13.5.1: Facebook ad examples for mobile and desktop feeds *Adapted From Blue face media, 2017*

These ads have several options for placement in your users' feed. They can appear RHS (right hand side) desktop, in the news feed on desktop, or in the news feed on mobile. Because Facebook owns Instagram, you also have the option of showing certain ad types there. The vast majority of Facebook's revenue comes from mobile, so they are very focused on a good mobile experience for their users. Find out more about their ads here: https://www.facebook.com/business/ads-guide You can also find a very useful infographic summarising the various options here: wersm.com/the-complete-guide-to-facebook-ad-specs/#prettyPhoto/0/.



Figure 13.5.2: Facebook ad placement options *Adapted From Facebook, 2017*

Targeting options

Once you have chosen an objective and ad type, you will need to look at Facebook's targeting options, which gathers user data from Instagram and WhatsApp as well. They offer three audience options to choose from:

> **Note**
>
> Facebook advertising information can be found at: www.facebook.com/ business/products/ads.

1. Core audiences, where you select your audience manually based on demographics like age and location.
2. Custom audiences, where you upload a contact list to connect with customers on Facebook.
3. Lookalike audiences, where you use customer information to find people similar to them on Facebook.

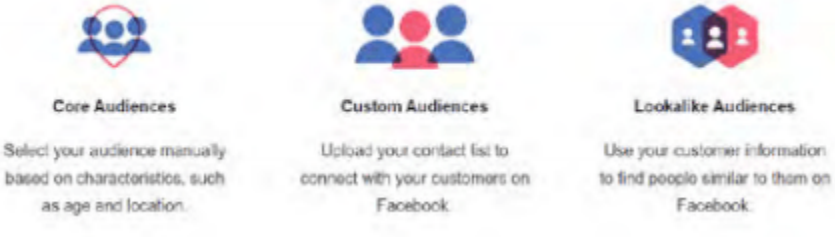


Figure 13.5.3: Facebook audience options *Adapted From Facebook, 2017*

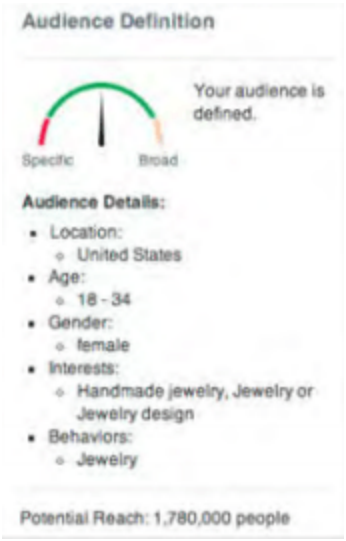


Figure 13.5.4: A defined audience on Facebook *Adapted From Screenshot, Facebook, 2017*

Core audience (manual) selection allows many detailed targeting options:

1. **Location:** Where the users are located, city, region etc. Allows exclusion of locations.
2. **Demographics:** Age, gender, languages, relationships status, type of work, education, and more.
3. **Interests:** Interests, hobbies, and Pages they like on Facebook.

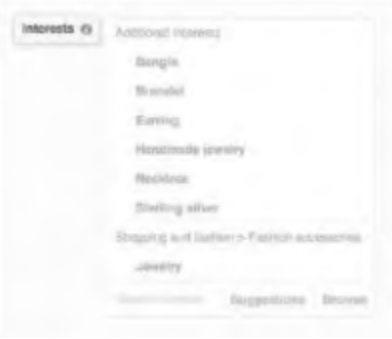


Figure 13.5.5: Interests targeting on Facebook *Adapted From Screenshot, Facebook, 2017*

4. **Behaviours:** Activities users do on or off Facebook that give information on which device they use, their purchase behaviours or intent, travel preferences, and more.
5. **Detailed targeting:** Offers the option to include or exclude users who meet at least one parameter (not all of them). This can include whether people have a connection to you on Facebook (or have friends who do).

For a full list of Facebook targeting options, look at this infographic: i.marketingprofs. com/assets/images/daily-chirp/170213-infographic-complete-guide-to-facebookad-targeting-full.jpg

If you select multiple options from within an ad targeting category, you'll reach users who meet any of the options you've selected. For example, if you choose multiple **Locations** like the **United States** and **Canada**, you'll target anyone who lives in either the United States OR Canada, not both.

Another example might be choosing multiple options from the **Interests** targeting category. If you choose interests like **Golf** and **Tennis**, you'll target anyone who likes golf OR tennis, not just users who like both golf and tennis. Keep in mind that it's not possible to target ad sets only to the users who fall into all of the selected categories. Custom audience selection has several benefits, including:

- Powerful exact targeting
- No wastage
- Cap bidding and frequency

- Data is encrypted and secure.

Using these selectors, you can create a list of who you want to reach using their email addresses. Facebook matches the email addresses and allows exact targeting of those users through their ads. Custom audiences are extremely powerful; if you have users' email addresses, you can target individuals. This is useful for any brand that uses newsletters or gathers email addresses elsewhere.

Lookalike Audiences is useful because it helps you find a similar audience to your existing fans and gives more accurate targeting. This makes it easy to find more users on Facebook who are like the people you know. You can build a Lookalike Audience based on:

- People who like your Page
- Custom Audiences that you've created with emails, phone numbers, or website or app data.

It's an effective way to reach even more potential customers because you can target your Lookalike Audience with the adverts you create.

The Facebook Pixel

The Pixel is a piece of code you can build into your website to help you track user actions and remarket to them on Facebook. Your conversions can be tracked across mobile phones, tablets and desktops, you can optimise your bids for website conversions and ensure that your ads will be shown only to the users most likely to convert, and you can remarket to or reach users on Facebook who have visited your website. You can learn more about the pixel and get started with it here: www.facebook.com/business/a/facebook-pixel.

Facebook advertising tips

As you dip your toes into Facebook advertising, remember:

- Ads can be unpublished posts targeted at a specific audience.
- Multiple ads can run at the same time.
- Targeting should not be too granular, unless the audience is highly qualified.
- With awareness-based advertising, keep your reach and frequency as high as possible.
- Check your ads in Facebook's Ads Manager (or, for more advanced advertisers with multiple campaigns and ad sets, the Power Editor).

> **Note**
>
> Facebook will suggest a bid to help make sure that your ad will reach a significant portion of your audience.

Instagram

Instagram is a very large mobile platform with an engaged mobile audience, making it a good option for some businesses.

> **Note**
>
> You can do Facebook's own training course, Facebook Blueprint, for free to learn every aspect of its offering: www.facebook.com/blueprint

Objectives

Instagram offers three ad types driven by the objectives you want to achieve, which are not surprisingly, similar to Facebook ad objectives:

- Brand awareness
- Reach
- Traffic
- App installs
- Engagement
- Video views
- Lead generation
- Conversions

Ad types offered

Not every ad type is available for every objective. Once you choose an objective, you will be shown the ad types you can use. The three ad types offered by Instagram are:

1. **Single image ads**, which are exactly what they sound like.
2. **Video ads**, which can share videos up to 60 seconds long.
3. **Carousel ads**, which are similar to single image ads but include multiple images that users can swipe to see.
4. **Slideshow ads**, which are like Carousel ads, except the images scroll on their own with music creating a mini video.
5. **Instagram Stories Ads**, which include single image and single video ad formats that are placed within Instagram Stories (ShorterURLs, 2017).



Figure 13.5.6: A Carousel ad on Instagram *Adapted From Adweek, 2017*

Some companies can expand the types of Twitter advertising available, For example, Ad Dynamo (www.addynamo.com/new), which is focused on Africa, offers a range of ad types that are not available through self-service. Blue Robot (www.bluerobot. com/index.jsp#about) is another company that allows you to automate Twitter in a number of ways, such as automatically responding to Tweets with live data or building automated responses based on Tweets from various locations.

Targeting options

Instagram has many of the same targeting options as Facebook. They include:

- Custom audiences (target audiences of users you already know, which includes lookalike audiences)
- Location, age, gender, language targeting
- Detailed targeting (include or exclude users based on demographics, interests and/or behaviours)
- Connections (include or exclude users based on connections to your page, apps, or events).

You can also save an audience to use it for future ad sets.

Instagram advertising tips

- Remember, Instagram shares targeting options with Facebook so make use of them, but don't go too granular.
- Don't make your post look like an ad, it should be visually arresting and enjoyable first, advertising second. It should blend in with organic content rather than stand out as an ad.

- Include a hashtag so that users can find your posts/ads more easily. Bigger brands can create their own hashtags.

> **Note**
>
> You can find out more about advertising on Instagram at: https:// business.instagram. com/advertising or at blog. hootsuite.com/howto-use-instagram-forbusiness/

- Try to tell a brand story and think carefully about how details will affect what audiences take from your images.

Twitter

Twitter offers a self-service ad platform with several options and allows a degree of specific targeting. The service does still tend to change frequently, and not all options may be available to all regions or user accounts. Objectives Like Facebook, this is mobile first and the ad formats match the actions you want users to take. The basic objectives are:

1. **Promote your brand**

- Website clicks or conversions
- Increase followers
- Awareness
- Tweet engagements

2. **Promote your video**

- Video views

3. **Drive conversions**

- App installs or re-engagements.

Learn more about Twitter campaign types (which are slightly different from ad objectives) here: business.twitter.com/en/advertising/campaign-types.html

Ad types offered

- **Plain text tweet** are tweets that appear at the very top of a user's timeline, or in Twitter mobile apps. There is no minimum spend, and advertisers pay when users retweet, @reply to, favourite, or click on a promoted tweet.



Figure 13.5.7: A plain text tweet promoting a brand with a downloadable coupon *Adapted From Twitter, 2017*

- **Single image card**, is a tweet with a single image.
- **Multi-image card** includes up to 4 images that users can click on each image to enlarge.



Figure 13.5.8: A Multi-Image card on Twitter *Adapted From Adparlor, 2016*

- **Promoted video**, a tweet that includes a single video.
- **Basic App card and Image app card**, a tweet that includes a call to action button that installs the app, or directs users to their App store.
- **Video app card**, an app install tweet that includes a video.
- **Website card**, a tweet that includes a button that takes the user to the website.
- **Lead Generation Card**, a tweet card that enables a user's details to be autofilled in and sent to the brand with the simple click of a button.



Figure 13.5.9: A Lead generation card *Adapted From Adparlor, 2016*

- **Conversational ads**, are ads that enables brands to engage directly with users, and that users can share with their followers.

These are the most popular options available, but there are others. You can find a full list of Twitter cards here; they change fairly frequently, so make sure to check in often: dev.twitter.com/cards/types

Targeting options

Twitter targeting options are nearly as detailed as Facebook. You can choose an audience based on:

- Location (country, state, region, metro area, or postal codes)
- Gender
- Language
- Device, platform, and carrier
- Keywords
- Followers

- Interests
- Tailored audiences (you can upload a list of emails or Twitter IDs, or you can put a code snipped on your website to collect visitors, purchasers, or downloaders and then target them)
- TV targeting (to target users who engage with television programs in a specific market, or by show)
- Behaviours
- Events (users interested in global or regional events).

Twitter advertising tips

- Use your own campaign, specific hashtags rather than using generic ones
- Use multiple tweets per campaign, test your options
- Include a deadline
- Monitor influencers, what works for others could work for you
- Make sure your ads contain content worth sharing.

LinkedIn

LinkedIn ads allows you to create and place adverts on prominent pages on the LinkedIn website, including a user's home page, search results pages, groups and more. It has both self-service and premium options, and offer 'sponsored updates' as a self-service option. There is a minimum budget requirement of US $10 a day, though no minimum spend, that is, you have to budget at least US $10 a day, but you don't actually have to spend any of it. Ads can be served on a CPM or CPC basis.

Objectives

LinkedIn offers 3 main objectives:

1. Reach LinkedIn members in their LinkedIn feed and beyond.
2. Drive targeted ads across multiple LinkedIn pages.
3. Send targeted messages directly to those who matter the most to your business.

Ad types offered

LinkedIn offers five types of ad:

- Sponsored content
- Sponsored InMail (reaching your audience through their LinkedIn inbox)
- Dynamic Ads
- Display Ads
- Text ads.



Figure 13.5.10: LinkedIn ad types. (Source: LinkedIn)

Sponsored stories are when content posted on a brand's profile is promoted through display ads or into the feeds of users across the LinkedIn network, according to your targeting preferences. Text ads can be shown on the right-hand side across desktop, mobile, and tablet.



Figure 13.5.11: LinkedIn ads *Adapted From Screenshot, LinkedIn, 2017*

Targeting options

LinkedIn offers many targeting options, including:

- Job title
- Job function
- Seniority
- Industry
- Skills
- Degrees
- Geography
- Age
- Gender
- Company name
- Company size
- LinkedIn group.

LinkedIn advertising tips

- Test variations of your ads to see which is the most successful. The text ad option allows you to create up to 15 variations of a single ad.

> **Note**
>
> You can find more information about LinkedIn advertising at: business.linkedin.com/.

- Consider your budget carefully. Sponsored InMail ensures you'll at least be seen by your target, and display ads are a good way to stay top of mind, but both can be quite expensive.
- Make sure you use all the allotted characters for ad copy to describe your service.
- Use images with the correct ratio so that they look good, both on desktop and mobile.

Pinterest

Pinterest advertising is still relatively new and has limited availability worldwide. A business account is necessary to advertise on this platform.

Objectives

When creating a Pinterest Promoted Pin, you will be asked to choose a goal for your campaign. Your options are:

Traffic campaign: To draw users to your website

Engagement campaign: To encourage close ups, repins and clicks on your Pin

Awareness campaign: To reach a wide audience.

Ad types offered

The only ad type on Pinterest is Promoted Pin. Here, you select an already existing Pin to use. When you choose a Pin while setting up an ad, you have the option to filter your Pins to see which are your best-performing (most clicked and most repinned) Pins from the last 30 days.

Targeting options

Targeting options for Pinterest are:

- Interests and Keywords: You have 420 interests to choose from, and you can manually add keywords, import an existing list of keywords, or use the keywords that Pinterest recommends for you. Choose carefully, and try not to use all 150 keywords that the platform allows you to add, be focused.
- Specific audience: Users who have visited your site or app, engaged with Pins that link to your site, or – similar to Facebook's 'lookalike' audience – an 'actalike' audience that is similar to users who are already engaging with you.
- Location
- Language
- Device
- Gender.

Pinterest advertising tips

- Make sure that the ads you select reflect your brand promise. Misleading or exaggerated claims are more than a bad idea; Pinterest prohibits them.

Note

Read more about advertising with Pinterest at: https://ads.pinterest.com.

- Use vertical images. This isn't required, but users prefer it.
- Optimise your pins for mobile viewing.
- Research Pinterest trends so that you can keep your campaigns relevant.

Snapchat

Snapchat's paid advertising options are relatively young, but they have grown almost as rapidly as the app itself. There are a variety of ways that brands can advertise on Snapchat.

1. Lenses and geo-filters
2. Discover channels
3. Live channels
4. With influencers
5. Takeover
6. Promotion
7. Unboxing
8. Product placements.

Objectives

Snapchat does not require you to select an objective to create an ad, but it can help you reach the usual objectives, such as:

- Visit a mobile website
- Install an app
- Watch a long-form video
- View an article.

Ad types offered

Snapchat offers a few unusual ways to reach your audience:

- **Snap Ads:** Mobile video ads that can be up to ten seconds long and will be vertical and full screen. Users can swipe up and reveal extended content, which could be an article, app install, long-form video, or mobile website.



Figure 13.5.12: Snap Ads for Suicide squad, Mike & Ike and Lipton *Adapted From Curalate, 2016*

- **Sponsored Geofilters:** A small piece of art or writing that covers part of the snap. A business chooses a location (or more than one), and when Snapchatters in that location take a Snap, the sponsored Geofilter appears as a filter option that can help users explain the context of that snap. This is great for local targeting and can cover a specific location, event, or theme (for examples, coffee shops across Florida). Sponsored Geofilters should be fun and attractive, provide context to the Snap, and encourage users to share them.



Figure 13.5.13: A sponsored Geofilter *Adapted From Snapchat, 2017*

Note

Take a look at the first campaign to use limited-time Geofilters, where McDonald's achieved 12 million filter snaps, 308 million filter views, and 400 million filter impressions: http:// shortyawards.com/8th/ mcdonalds-geofilters

- **Sponsored Lenses:** An interactive ad. The brand creates an interactive filter that can be added to a Snap, an animation can be added, and the Lens can be shared or posted to users' own Snap Stories. They are a lot more complex to develop, and thus are a very costly and labour intensive option. Many movie franchises have found great success in raising awareness for new releases.



Figure 13.5.14: A sponsored Lens advertising the Alien Covenant movie *Adapted From Adespresso, 2017.*

Targeting options

Snapchat includes a variety of targeting options:

- **Snapchat Audience Match:** Brands can anonymously match data from an existing list of email addresses and mobile device IDs to Snapchat's consumer data. Users can opt out of being included.
- **Snapchat Lifestyle Categories:** Brands can target users who view certain types of videos, such as pets or cooking.
- **Lookalikes:** Like the Facebook option, brands can target users with characteristics similar to their existing customers.

Snapchat is also aiming to up their targeting game by enabling marketers to use data from offline purchases to target users with relevant ads.

Snapchat advertising tips

- As always, make sure your content fits the platform: Snapchat is informal and natural, using fun filters and add-ons, rather than the more posed images you might see on Instagram.

> Note
>
> Read more about Snapchat advertising at www.snapchat.com/ads.

- Tell a story: Test your content to see what works best.
- Use influencers: This is a great way to reach even more users.

Other platforms

Of course, this is by no means an exhaustive examination of available platforms for social media advertising. For example, some marketers still like Google+, and YouTube is a huge platform for marketers. YouTube offers a wide range of advertising formats and options for businesses. These are covered in detail in the chapter on video marketing.

> Note
>
> Read more about this in the Video marketing chapter

Different countries have different preferred platforms. For example, Weibo and WeChat are very big in China. Check out a case study focusing on Russian audiences here: www.digitaltrainingacademy.com/casestudies/2017/01/social_media_case_study_asos_reaches_russian_audience_through_vk_and_yandex.php#more

Make sure you do your research so that you know which platforms your audience is active on and where you might want to advertise. For example, Reddit (www. reddit.com), along with similar content curation platforms, is great for sharing good content, but the community is very advertising-savvy and does not welcome overt ads that do not provide value to the user.

You may also want to keep an eye on up-and-coming platforms, such as Wanelo (wanelo.com).

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13.6: Advantages and challenges

Some of the difficulties of advertising on social media are the same as the difficulties of being on social media in general. They include:

- Promoted posts all need to work hard to make an authentic connection with the audience.
- You need to consistently promote good content.
- There is always the chance that your audience will respond negatively to a post, which can escalate quickly.
- Choosing the right platform to advertise on can be a challenge.
- Tying ad spend on social media to revenue increases can be difficult, since the benefits of advertising on these platforms are often indirect. Take a look at Sprout Social's Ultimate Guide to Measuring Social Media ROI for some tips: sproutsocial.com/insights/social-media-roi-guide.

It is important to clarify with whomever you are reporting to that ROI on social media is not an exact science. Far more data is available than on traditional media, but it has its limits. So rather than drawing a clear line from social media advertising to sales, look at encouraging behaviours that lead to sales, such as convincing users to sign up for a test drive rather than attempting to sell a car. You can easily calculate ROI if you know how many signups for test drives you get from Facebook, and how many test drives result in sales.

Despite its challenges, advertising on social media cannot be avoided. If you want to reach the maximum possible number of users with granular targeting that ensures you're reaching exactly the right users at the right time, social media advertising is the way to go. It is also the only way to ensure that a significant portion of your audience per platform will see your posts.

Like social media in general, advertising on this channel can:

- Increase brand recognition
- Improve brand loyalty.

It is:

- Fairly low cost
- Easy to share, and
- Allows for real-time analysis of your campaigns and audience.

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13.7: The bigger picture

Social media advertising ties in with any number of other marketing channels. You can use it to push content marketing to an audience that will appreciate it and encourage shares and earned media coverage, to drive traffic to your website, to push offline campaigns and encourage chatter about them, and much more. Any marketing campaign should keep social media advertising in mind as a potential way to increase reach and engagement.

The incredible targeting opportunities offered by social media advertising allow content to reach exactly the right audience at the right time to encourage interaction or conversions, and paid promotion is the best way to boost the reach of any post.

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13.9: Measuring success

Measuring the success of your social media advertising activities can be tricky. As mentioned, ROI can be difficult to establish, but it can be done!

> **Note**
>
> Not only is 'number of followers' a vanity metric, too many followers who are not quality followers can actually harm you. Remember, only a tiny percentage of your total audience will see your content organically, so you want them to be engaged.

First, you want to identify your KPIs. Note the difference between vanity metrics and those metrics that will actually be useful. The number of fans on Facebook, for example, is a vanity metric. It doesn't mean much on its own. Instead, you would want to look at percentage increase in number of fans, or the engagement rate of the fans that you have, to see whether you are doing well.

The KPIs you identify as important will depend on the goals of any campaign you run. For example:

- If you want to drive revenue, your important KPIs will be sales related such as product purchases, signups for trials, or traffic to your website (which could then turn into a conversion).
- If your goal is awareness, your most important KPI might be reach.
- If your goal is building customer relationships, you would want to look at engagement numbers and sentiment.

If you want to attach actual monetary value to your KPIs, you need to decide what method you want to use. Do you want to look at average sales, the lifetime value of a customer, or how much similar reach would cost you if you used different methods of advertising?

To measure your KPIs, you'll need to use the analytics tool of the platform you're advertising on (see below). You can use Google Analytics to see whether social drives traffic to your website, to which specific posts you can attribute revenue, to find out how visitors from social consume your content, and to discover how social impacts conversions. Find out more about how to do this here: www.socialmediaexaminer. com/how-to-measure-social-media-using-google-analytics-reports and here: blog.hootsuite.com/tracking-social-media-in-google-analytics.

You may also consider social media dashboards like Hootsuite, which help you monitor campaigns across platforms.

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13.10: Tools of the trade

The most important tools you'll need here are the analytics tool for each platform you work on:

- **Facebook Page Insights:** www.facebook.com/business/learn/facebookpage-insights-basics
- **Facebook Ads Manager:** https://www.facebook.com/business/ help/415745401805534
- **Facebook Power Editor:** https://www.facebook.com/business/ help/162528860609436
- **Instagram Insights:** www.facebook.com/business/help/1533933820244654. You can also find some free Instagram analytics tools here: socialbeesmedia.com/best-free-instagram-analytics-tools-2016
- **Twitter Analytics:** analytics.twitter.com
- **LinkedIn's Campaign Manager:** www.linkedin.com/uas/login
- **Pinterest Analytics:** analytics.pinterest.com
- It can be difficult to measure on **Snapchat**, but a few tools exist, such as Snaplytics: snaplytics.io.

Google Analytics can also be used, as discussed in section 13.7, Measuring Success. You can find a list of 5 Tools to Measure Social Media ROI here: www.socialmediaexaminer.com/5-tools-to-measure-social-media-roi.

As mentioned, you may also want to consider a social media dashboard. Some popular options include:

- **Hootsuite:** hootsuite.com
- **Sprout Social:** lps.sproutsocial.com/social-media-dashboard
- **Fan Page Robot (a free tool):** fanpagerobot.com
- **Datorama:** direct.datorama.com/lp4.

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13.11: Case study - Kraft Mac and Cheese

One-line summary

To show off its new recipe, Kraft Mac & Cheese created a first-of-its-kind Snapchat Lens that used gamification to engage users (Digital Training Academy, 2016).

The challenge

Kraft wanted to share with their customers the news that they had removed artificial flavours, preservatives, and dyes from Kraft Mac & Cheese. They wanted a nostalgic campaign that would reach a younger audience, so they chose Snapchat as their platform.

The solution

The brand created the 'It's changed. But it hasn't.' campaign, partnering with Snapchat to create a Sponsored Lens that was interactive and encouraged engagement through gamification.

With this Lens, Snapchatters could virtually catch macaroni with their mouths. Each successful catch scored them points. This gamification aspect encouraged sending and receiving snaps with this Lens.

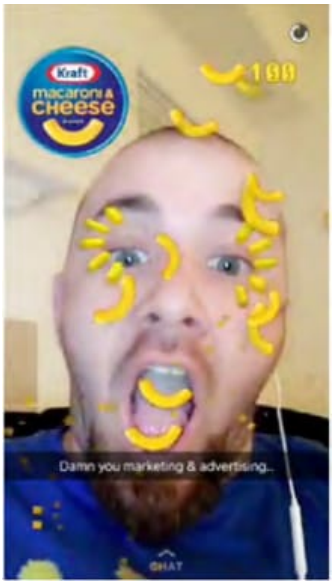


Figure 13.11.1: A Lens Snap from the 'It's changed. But it hasn't.' campaign *Adapted From OurKevdigital, 2016*

The results

The brand saw very favourable results from this campaign.

- It reached almost 20 million Snapchatters.
- 84% of those who remembered the Lens enjoyed it.
- Snapchatters played with the lens for an average of 20 seconds.
- Kraft Mac & Cheese saw a five point increase in brand favourability.
- They saw a 13% lift in purchase intent.

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13.E: Social media advertising(Exercises)

Case study questions

1. Why do you think Snapchat was the right platform for this campaign?
2. What do you think was so attractive about this Lens?
3. What could other brands learn from this campaign about advertising on Snapchat?

Chapter questions

1. What should be the primary consideration when choosing a platform on which to advertise?
2. What are the most exciting targeting capabilities offered by social media advertising?
3. What sets social media advertising apart from other forms of online advertising?

Further reading

Take a look at this infographic on How to Navigate the Social Media Advertising Solar System: www.marketingprofs.com/chirp/2017/31385/how-to-navigate-the-social-media-advertising-solar-systeminfographic?adref=nlt020717

Read The 7 Hidden Factors of the Most Effective Social Media Ads: blog.bufferapp.com/social-media-ads-strategies

Here is 10 Facebook Marketing Tips for Advertising on Advertising on Social Media: www.bluefountainmedia.com/blog/10-facebook-marketing-tips-for-advertising-on-social-media

And check out Social Media Advertising: The Complete Guide from Hootsuite: blog.hootsuite.com/social-media-advertising

Hootsuite's blog is always a good source of tips: blog.hootsuite.com

So is Sprout Social's blog: sproutsocial.com/insights

And Social Media Examiner has a lot of useful resources: www.socialmediaexaminer.com

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13.S: Social media advertising(Summary)

Social media advertising is an effective channel, at the very least, to reach as many of your users as possible on the platforms on which they are active. Certain guidelines apply to all social media advertisements, such as ensuring that ads will look good and function well on mobile, but others are platform-specific.

Each platform offers its own unique advertisements, targeting options, and analytics capabilities. Which platform you use should be informed not by where you wish to be active, but by where your audience already is.

In this chapter, we covered some of the most popular advertising platforms, but others do exist and should be considered depending on audience, location, and capabilities.

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14: RETAIN - CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Learning Objectives

In this chapter, you will learn:

- Why CRM is essential for any business.
- The role that customers play in shaping and steering your business.
- The difference between applying CRM as a communications strategy or a core business strategy.
- How to collect, store, analyse and update your essential CRM data.
- The step-by-step process of putting together your CRM strategy

14.1: Introduction

14.2: Key terms and concepts

14.3: A CRM model

14.4: Understanding customers

14.5: CRM and data

14.6: The benefits of CRM

14.7: Case study - Amazon Prime

14.8: The bigger picture

14.9: References

14.10: Social CRM

14.11: Step-by-step guide to implementing a CRM strategy

14.12: Tools of the trade

14.E: Customer relationship management(Exercises)

14.S: Customer relationship management(Summary)

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14.1: Introduction

Customer relationship management (CRM) has existed since people first started selling things. The first shopkeeper who stopped to chat with his customers, who knew them by name, and perhaps gave them a small ‘freebie’ for continually using his services, was practicing a form of customer relationship marketing by making customers feel special. He was also probably seeing the favourable impact on his bottom line. It helped that customers were being served directly by the business owner.

Today, with businesses becoming more digitally remote, and with person-to-person contact becoming more scarce, CRM is more important than ever. We need to build and maintain relationships with our customers. A faceless company is not personable or engaging so it has to work harder to fill the gap between attracting and retaining customers (and their good will). The relationship a customer builds with a company is often the reason they return. Building those relationships today is more difficult than ever, in a society where data is protected, customers are smart and exercise their right to choose, and a competitor can be just a click away.

CRM is a customer-focused approach to business based on fostering long-term, meaningful relationships. CRM is not about immediate profit. It’s about the lifetime value of a customer, the purchases they will make in future, the positive word of mouth they will generate on your behalf, and the loyalty they will show your brand. Effective CRM enables businesses to collaborate with customers to inform overall business strategies, drive business processes, support brand development, and maximise ROI.

There are two approaches to CRM. Either one can apply it as an approach to communication strategy using personalised and segmented contact, or as a core business strategy such as loyalty programmes. Which you choose depends on the size and goals of your business.

There is a truism that a happy customer tells one person, but an unhappy customer tells ten. With your customers’ voices being heard on blogs, forums, review sites and social media, they can talk loudly and impact your business easily.

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14.2: Key terms and concepts

Table 14.2.1

Term	Definition
Churn rate	The annual percentage rate at which a business loses customers.
Customer	A person who buys or uses goods or services, with whom a company should develop a relationship.
Customercentric	Placing the customer at the centre of an organisation's business planning and execution.
Customer lifetime value (CLV)	The profitability of a customer over their enti
Customer relationship management (CRM)	A strategy for managing a company's relationships with current, potential and lapsed clients. It often makes use of technology to automate the sales, marketing, customer service and technical processes of an organisation.
Data mining	The process of analysing data to discover unknown patterns or connections.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Lapsed	Someone who is no longer a customer
Model	A strategic visual representation of a process that a company adheres to.
Prospect	A potential customer
Segmentation	The practice of dividing customers into smaller sub-groups based on shared interests or characteristics.
Stakeholder	A person or organisation with an interest in how a resource is managed.

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14.3: A CRM model

Many companies that practice CRM rely on a simple model to guide them strategically. In many cases, this sums up exactly what CRM is about. Below is a simple model that demonstrates this.

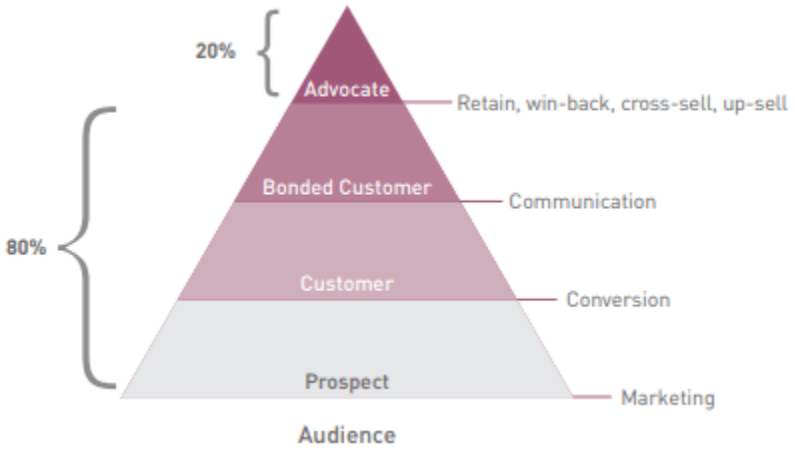


Figure 14.3.1: A simple CRM model can provide strategic guidance *Adapted From Stokes, 2013*

> **Note**
>
> Notice the Pareto effect, discussed later in this chapter, demonstrated in this model.

As you can see, a good CRM strategy turns strangers into customers, customers into friends, and friends into advocates for your business. One needs to identify the right touchpoints and messaging to drive a customer further along this funnel.

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14.4: Understanding customers

Customers should be seen as the most important stakeholders in a business. Without customers purchasing goods or services, most businesses would not have a revenue stream. It can be difficult to shift from realising this important fact to implementing it in day-to-day business decisions and strategy.

A successful relationship with a customer is based on meeting or even exceeding their needs. It is in determining what problems the customer has, and in providing solutions, sometimes before the problem occurs. It depends on continually giving the customer a reason to transact with your company above any other.

CRM should not only mean implementing customer-centric processes and consider technology, but embracing customer-driven processes. Through innovations in digital technologies, enhanced customer engagement, social listening and the introduction of mass personalisation, the customer can often drive the business.

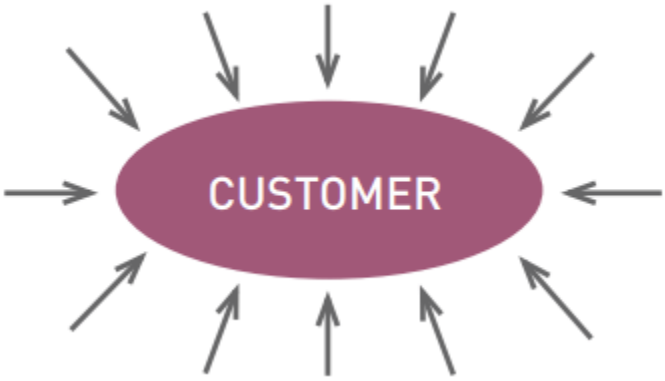


Figure 14.4.2: A customer centred approach keeps the customer as the focus of all business activities *Adapted from Bullhorn, 2016*

Consumer touchpoints

Consumer touchpoints are all the points at which brands touch consumers' lives during their relationship. This is the starting point for all CRM, a brand needs to speak with one voice across all of these touchpoints and deliver a rewarding and relevant experience every time it interacts with its customers. CRM can drive the anticipation of customer needs. Touchpoints can be brand initiated, for example, a brand sending an email newsletter, or customer initiated, for example, the customer making a purchase in a store or calling a call centre.

> **Note**
>
> A good CRM infrastructure must ensure touchpoints for dialogue.

A consumer touchpoint can be as simple as a print or banner ad. It can also be as multifaceted as a conversation between a call centre agent and a customer. It can be a timely tweet, or an outbound email giving the customer details about their account. Even statements and bills are touchpoints and need to be managed carefully to ensure that the brand continues its relationship with the customer successfully.

Customer touchpoints can generally be divided into three spheres or phases, prepurchase, purchase and post purchase.



Figure 14.4.3: Examples of touchpoints at each stage in the purchase process *Adapted From Wotsthebigidea, 2017*

Pre-purchase or pre-usage covers the various ways brands and prospects interact before the prospect decides to conduct business with a company. The brand's goals here are to:

- Gain customers
- Heighten brand awareness
- Shape brand perceptions or to highlight the benefits it offers over competitors
- Indicate how the brand provides value and fulfils the needs and wants of consumers
- Educate consumers about products and services
- Ignite the possibility of a relationship.

Purchase or usage covers the touchpoints at which the customer decides to purchase a product, use a service or convert according to set criteria, and initiates the brand-customer relationship. The key goals are to:

- Instil confidence
- Deliver value
- Reinforce the purchase decision
- Heighten brand perceptions
- Facilitate ease of purchase
- Reduce post purchase dissonance.

Post-purchase or usage covers all the post-sale interactions between the brand and customer. Now, the brand wants to:

- Deepen the relationship
- Maximise the customer experience
- Deliver on the brand promise
- Increase brand loyalty
- Remain top of mind
- Invite repeat purchases.

Customer loyalty

The main objective of any CRM strategy should be to gain customer loyalty over the long term. But what is loyalty? This may mean different things for different organisations. Ultimately, it is about acquiring and retaining customers who:

Note

Think of a brand that has extremely loyal fans, for example, Apple, Nike or HarleyDavidson. What do you think the brand did that encouraged people to support them so vocally?

- Have a projected lifetime value that makes them a profitable prospect to your business
- Buy a variety of your products or use your services repeatedly during their time as a customer
- Share their positive experiences with others
- Provide honest feedback on these products and services, and their experiences
- Collaborate with you on ways to improve their experiences.

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14.5: CRM and data

Data is central to the success of CRM initiatives. Knowing who your customer is, how they behave and what they want makes a CRM strategy successful. Data gathering can begin even before your prospect becomes a customer. Matching a prospect's profile to the product or offer is the first step.

But data on its own is meaningless if it is not analysed and acted upon. Through analysis, data can be turned into insights, which can then inform the various CRM processes and, indeed, the business itself.

Data should underpin the way each touchpoint is utilised to build loyalty.

Consider the consumer who shops on her store card at a retail outlet. Her transactions are recorded against her card and she is sent offers that detail the latest fashion trends and earns points on her card shopping for these. At some point, her transactional data shows that she has started shopping for baby clothes so she can now be cross-sold products to do with babies, and rewarded with double points when she buys them. Now she is increasing her spend in the store, cross-shopping for both herself and her family and being rewarded for this, thus ensuring that the retail outlet is offering her value and retaining her business.

Customer data

A good CRM programme begins with data. Who are my customers and what do they want? What are their demographic and psychographic needs? Why did they choose me in the first place? How many of them are active, and continue doing business with me? Why do the others stop? What is the average tenure of a customer?



Figure 14.5.1: What do you want to know about your customers? *Adapted From Janrain, 2017*

Note

Read more about this in the Data analytics chapter

Often, you will need to research this information. If the company has a database, conducting surveys, focus groups or dipstick telephonic research can help you get an idea. Consider that an Audi Q7 driver is vastly different to an Audi A1 driver, for instance. They both pick the brand for similar reasons, but their motivations behind choosing the products differ vastly.

Data can give you these insights. It can enable a company to create real value for the customer and thereby gain true loyalty. There is little point in running a customer insights survey, looking at the results and saying, "that's interesting" without putting into action any changes suggested by the results. Not auctioning noticeable changes also means customers are less likely to take part in surveys going forward, and quite rightly so, what's in it for them? Conversely, if you do action changes, customers will feel

increased ownership in the brand and its offering.

> **Note**
>
> Choosing a CRM system and operationalising it in your business is no small undertaking. Cost can be dramatically impacted by how well this system can integrate with other processes and tools in your business. Make sure to do your homework before jumping in.

The actual technology you use to gather and collate data is also crucial. Remember that there are many facets to CRM, and the quality and accessibility of the data will have a major impact on how well these processes run.

When looking at data, it is essential to keep in mind the Pareto principle. The Pareto principle, or 80/20 rule, holds that in many situations approximately 80% of profits are delivered by 20% of customers. Also keep in mind the traditional view that 20% of customers are responsible for 80% of problems related to service and supply (Koch, 2008).



Figure 14.5.2: The Pareto principle *Adapted From Slideshare, 2011*

This means designing solutions with efforts directed at the 20% of customers who generate the most profits. To do this, you should segment customers effectively. High value segments are unique to each business.

You'll also want to consider the exact data to collect. While this will depend largely on your business objectives. Here are some considerations.

- Information should be commercially relevant.
- Capture additional contact details from the customer at every organic interaction such as on purchases, contracts, negotiations, quotes, conversations.
- Allow your customers to manage their data along with you.
- Capture any information you send out to the customer.
- Consider anything that adds value to the relationship.
- Note any legal implications around capturing and storing data, particularly web-based behavioural data, as the user's privacy must always be taken into account.

Where and how to gather CRM data

CRM data is gathered from a variety of touchpoints. Let's look at some of the possible opportunities for CRM data capture and analysis. Each avenue discussed below collects a range of data from whichever touchpoints the business deems valuable.

Traditional CRM system data

Most traditional CRM systems are used to capture data for sales, support and marketing purposes. On top of simply creating a central repository for data access, these systems and their related databases also offer basic analytics. The actual range of data collected within the traditional CRM system is dictated by the CRM objectives. For instance, data could include:

- Demographic details on potential leads, current leads and contacts, such as contact information, age, gender, and income
- Quotes, sales, purchase orders, and invoices (transactional data)
- Psychographic data on contacts such as customer values, attitudes, and interests
- Service and support records
- Customer reviews or satisfaction surveys
- Web registration data
- Shipping and fulfilment dates, such as when orders were shipped and delivered.

Data mining and testing hypotheses

Data mining involves analysing data to discover unknown patterns or connections. It is usually conducted on large datasets and looks for patterns that are not obvious. Data is analysed with statistical algorithms that look for correlations. It is used by businesses to better understand customers and their behaviour, and then to use this data to make more informed business decisions. For instance, women might traditionally be shopping for nappies during the week. On the weekend, men may become the primary nappy-shoppers. The things that they choose to purchase on the weekend, such as beer or chips, might dictate different store layout over a weekend.

> **Note**
>
> Data mining is typically performed by computers, which can sift through massive amounts of data and find tiny but significant patterns that a human researcher may overlook.

Analytics data

Analytics data is generally captured through specialised analytics software packages. These packages can be used to measure most, if not all, digital marketing campaigns. Web analytics should always look at the various campaigns being run. For example, generating high traffic volumes by employing CRM marketing tactics like email marketing, can prove to be a pointless and costly exercise if the visitors that you drive to the site are leaving without achieving one or more of your website's goals.

> **Note**
>
> Read more about this in the Data analytics chapter

Social media monitoring data

There are many social media metrics that are important to monitor, measure and analyse, and some of these can provide valuable insights for CRM implementation. This can cover everything from quantitative data about number of fans and interactions, to qualitative data about the sentiment towards your brand in the social space. Social media metrics can also lead you to new prospects.

Collating and organising your data

Typically, you'll find that a business has:

- One or more databases such as email, customer, mobile, or call centre databases, or datasets in silos.
- A point of sale system where product purchase data is stored.

- Various forms of web data from display or search networks, keyword research, site analytics, social media, or email marketing.
- Social media profiles on sites like Twitter, Facebook, or LinkedIn, which can also be considered databases of sorts.

CRM software can be used to automate lead and sales processes, and to collect all of this customer information in a centralised place, allowing a company to get a holistic view of the customer; from this, meaningful data insights can emerge.

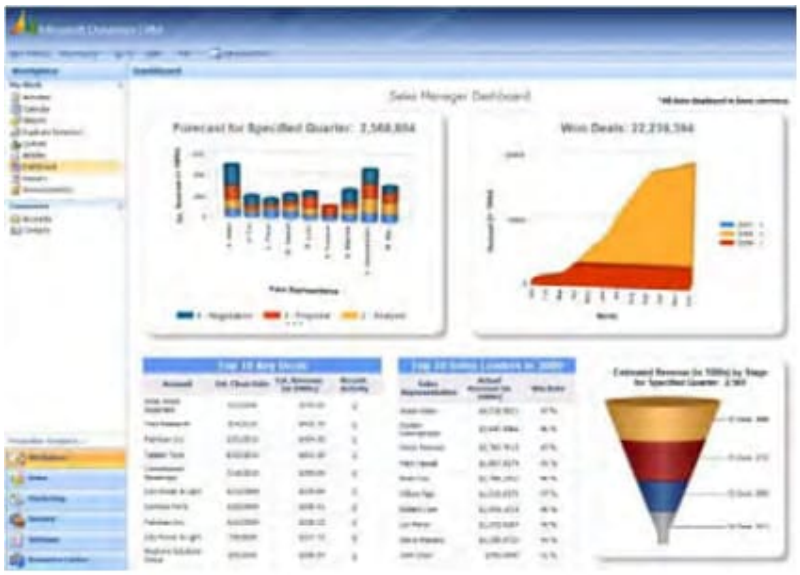


Figure 14.5.3: CRM software can present dashboards for monitoring and analysing your data *Adapted From CRMdirectory, 2017*

> **Note**
>
> Have you ever had a frustrating service experience with a brand? How did you feel about the brand afterwards? Large organisations need a single view of the customer to avoid frustrating them.

Organisations can be large, and a customer often speaks to several members of the organisation, depending on the nature of the communication. It would be extremely frustrating for the customer to have to explain all previous dealings with the organisation each time, and equally frustrating for an organisation not to know who has spoken previously with a customer and what was dealt with. This could be a touchpoint at which a company falls down, and leaves a less than positive impression with the customer.

Fortunately, there are many technological options that help to record all this information in one place. Most of these services can also schedule elements of the sales process, and set reminders where appropriate for follow-up action.

> **Note**
>
> Consider user adoption rates and the cost of time and integration when making a decision about which CRM software to use.

Some notable examples include Salesforce (www.salesforce.com), Genius (www.genius.com) and Highrise (www.highrisehq.com) from 37signals. Bespoke technology tailored to business problems can have remarkable results.

Keeping data fresh

Call it what you will, but ‘stale’, ‘outdated’ or ‘unhealthy’ data doesn’t benefit anyone. Some generic older data can help you assess trends over time, but identifiable customer data is usually redundant if not up to date. People move house, update their contact numbers and email addresses, and change jobs. They earn more or less, stop working, start working, have kids, and retire. All of these mean that their needs change, and their contactability changes, so maintaining a customer relationship and delivering relevant communication becomes impossible if your information is not fresh.

So, how do you keep your data fresh?

For generic data (like web analytics), you must continuously monitor trends and note what causes changes over time. This is also useful for monitoring trends and identifying gaps in data when a business evolves. For instance, if you know that you generally receive increased website and store visits during December, but your sales drop, you know that you need to gather more data around your inventory and in-store environment during that time.

Keeping identifiable data current means you need to facilitate regular dialogue with contacts on your database. Whether it's through a call centre, an online prompt or a quick question at your in-store point of sale, there needs to be a plan for updating details at regular intervals. You can empower your customers and incentivise them with programme attractiveness.

Analysing data for marketing

One of the most powerful features of interactions and transactions over the Internet is that everything is tracked and recorded (see the Data analytics and Conversion optimisation chapters). This provides a wealth of data that can be analysed to make business decisions.

> **Note**
>
> Read more about this in the Data analytics and Conversion optmisation chapters.

For CRM, this means that the customer acquisition source can be recorded and analysed against sales data. This leads to a very accurate return on investment (ROI) calculation and indicates where CRM and marketing efforts should be focused.

ROI stands for return on investment – and it's key to understanding whether marketing efforts have been successful. Here's a simple example: Company A sells accounting software and makes R10 000 on each product it sells. It sends an email to its customer base, users who have bought a previous version of the software and might be interested in upgrading. The campaign has an overall cost of R100 000. Of the 5 000 users who receive the email, 10% decide to buy. That means it cost R200 to acquire each of the 500 customers. The company has made R5 million, an ROI of 50:1.

The key to effective use of technology in CRM is integration. Ensure that all channels can be tracked, and that information is usable to all parties within an organisation. Knowing where your customers come from, but not what they purchase, is pointless: these two metrics need to be compared in order to produce actionable insights. Analysing CRM data can aid marketing initiatives in a variety of ways.

- **Campaign analysis:** Find out which marketing campaigns are leading to the best returns so you can refine them and increase ROI
- **Personalisation:** Customise your communications to each customer
- **Event monitoring:** Tie offline events, like shows or sales, to your online interactions and sales
- **Predictive modelling:** Predict a customer's future behaviour and meet this need at the right time.

> **Note**
>
> Mobile marketing can play a key role in offline events, after all, the mobile phone is portable and connected to the internet, meaning that users can engage a brand directly on location.

Improved customer segmentation, including:

- Customer lifetime value (CLV) analysis: Predicting each customer's lifetime value and managing each segment appropriately, for example, offering special deals and discounts.
- Advanced customer profiles that identify certain behaviours, such as big spenders or those who look for bargains by attending sales. This information can be used to tailor marketing communications accordingly.
- Customer prioritisation: Target small groups of customers with customised products and service offerings that are aligned to meet customer needs, rather than simply generic current offerings. You should craft specialised retention strategies for customers with the highest CLV.

- Identifying brand influencers and advocates. Consider the realm of social media, where influencers are central to the spread of content. Brands are increasingly prioritising relationship building with social media influencers to build brand advocates who will help market the business for them. By identifying which customers are providing the most value and positively influencing others to become customers, you can focus efforts towards them and increase their loyalty, creating true brand advocates.

Understanding customer lifetime value

CLV is the profitability of a customer over their entire relationship with the business. Businesses need to look at long-term customer satisfaction and relationship management, rather than short-term campaigns and quick wins. This approach leads to increased value over the entire lifetime of a customer and means that CLV is a metric central to any CRM initiative.

It's important to look at your customer base and segment them according to how often they purchase and how much they spend with your company. Very often, customers who spend more cost more to acquire, but they might also stay with the company for longer. Referrals made by a customer can also be included as part of the revenue generated by the customer.



Figure 14.5.4: The customer's average order value and how often they order are used to determine their CLV *Adapted From Smile.io, 2017*

The key is to understand these costs and then target your CRM strategies appropriately. CLV lets you decide what a particular type of customer is really worth to your business, and then lets you decide how much you are willing to spend to win or retain them.

For example, a potential customer looking to purchase a digital camera is likely to search on Google for cameras. As a company selling digital cameras, your excellent search advert and compelling offer attract the potential customer, who clicks through to your website. Impressed with your product offering, the user purchases a camera from you, and signs up to your email newsletter as part of the payment process.

Analysing the amount spent on your search campaign against the sales attributed to the campaign will give the cost per acquisition of each sale. In this case, this is the cost of acquiring the new customer.

As the user is now signed up to your newsletter, each month you send her compelling information about products she may be interested in. These newsletters could be focused on her obvious interest in photography, and highlight additional products she can use with her new camera. Think about the value exchange that is necessary for a customer to give you their attention. Content marketing is a powerful tool here. The costs associated with sending these emails are the costs of maintaining the relationship with the customer. When she purchases from you again, these costs can be measured against the repeat sales likely to be made over the course of the customer's lifetime.

Note

See the chapter on Content marketing strategy for more on the importance of offering customer s value.

Assuming that a customer buys a new camera every three years, moves up from a basic model to a more expensive model, perhaps buys a video recorder at a certain point. All of these allow a company to calculate a lifetime value and ensure that their spending on a particular customer is justified.

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14.6: The benefits of CRM

At its core, effective CRM promises the following:

- Increased revenue and profitability
- Improved customer satisfaction and loyalty
- Improved service delivery and operational efficiencies
- Decreased acquisition costs, keeping churn low through CRM offsets the need to spend as much on acquisition of new clients, while retention of existing ones is cheaper for obvious reasons.

> Note
>
> See the chapter on Content marketing strategy for more on the importance of offering customer s value.

Maintaining good customer relationships is critical to the success of a business. The cost associated with acquiring a new customer is generally far higher than the cost of maintaining an existing customer relationship. While an investment in a CRM communication programme or platform can be large, these costs are often offset over the increased revenue generated by encouraging repeat business.

> Note
>
> A CRM communication programme is a cross functional investment, which requires leadership buy in.

Putting a value on CRM

Broadly, CRM can be looked at from:

- **A marketing perspective:** Understanding your customer segments and building a relationship with them.
- **A cost perspective:** Decreasing the amount you spend on customers; it costs more to attract a new customer than maintain an existing one.
- **A sales perspective:** Turning the users who know about your service or product into customers who have made a purchase, in other words, managing prospects.
- **A service perspective:** Ensuring that users who have interacted with you are satisfied and delighted.

Effective CRM can also create a powerful new marketing and referral force for a company: its happy customers. Delighting customers fosters positive word of mouth.

The first step to any CRM initiative is to understand the value of a customer relationship to a business.

Relationship value = Revenue generated by customer – Cost of maintaining/servicing the relationship

CRM implementations

CRM should infuse every aspect of a business in the same way that marketing should be integral to everything you do, but it is useful to look at the different ways CRM is implemented.

Marketing

- Conduct personalised targeting and profiling across a range of marketing channels such as telemarketing, email marketing, social media marketing and campaign management projects.
- Place the right mix of a company's products and services in front of each customer at the right time.

- Understand what customers do and want, matching that knowledge to product and service information and measuring success.

Sales

- Ensure the customer receives the correct product.
- Ensure correct sales-related processes are carried out within the organisation. This could include:
  - Client or campaign management
  - Sales configuration, for configuring products or pricing
  - Call management
  - Contact management
  - Ad management
  - Sales force automation (including territory)
  - Account and lead management systems.
- Enable all parties in the transaction to interact with one another.
- Include systems that put sales reps directly in touch with customers at the point of sale.

Service and service fulfilment

Improve the service you give to current customers through:

- Email response management
- Social media support systems
- Telephony capabilities such as automatic call distribution
- Computer-telephony integration
- Queue/workflow management
- Interactive voice response and predictive dialling.

Include the development of problem resolution systems, workflow automation and field service dispatch systems.

Services invoked by the customer

Create and manage systems or capabilities that can be directly invoked by the customer.

- Web self-service
- Search
- Instant messaging
- Email queries
- Voice over IP (VoIP)
- Browser and application sharing
- Conferencing
- ‘Call me’ capabilities
- Social media support
- Online forums.

CRM loyalty programs

There is a difference between CRM and loyalty programmes; often loyalty programmes actively seek to maintain customers by rewarding them with a hard currency, like points. Loyalty programmes are designed to develop and maintain customer relationships over a sustained period of time by rewarding them for every interaction with the brand. For instance, you may earn points on a purchase, for shopping on certain days, completing a survey, or choosing to receive a statement by email.

Consider South African health insurer Discovery and their Vitality program. It aims to keep customers healthy by rewarding them for health-related behaviours like exercising, having regular check-ups, stopping smoking and buying fresh foods. By doing so, it reduces the burden of ill-heath on the medical aid itself.



Figure 14.6.1: An advert for Vitality promising cash back for keeping fit *Adapted From Discovery, 2015*

Not all loyalty programmes are created equal. Many brands have embraced them as a way to improve their sales, and consumers have come to believe that they are simply a way of extorting more money from them.

To create an effective loyalty programme, consider the following:

- **Carefully calculate the earning and redemption rates of points:** A loyalty programme needs to give the appearance of real value, while working within the company's profit projections.
- **Loyalty programmes are about value exchange:** You need to find a way to partner with the customer.
- **Rewards are key to success:** You need to offer value to the customer in a way that is real and desirable.
- **Customer care is important, but it's a hygiene factor, not a differentiator:** Technology allows for effective real-time conversations.
- **Data, a single view of our customer, is central to success:** You need to maintain accurate records in one central place.
- **Digital allows for innovation:** This can apply to new payment technology, digital communications channels and more.
- **Trust is pivotal to success:** Customers need to know that their data is being protected and that you will honour your commitments. Legal requirements in your country may demand it.
- **Loyalty programmes are not quick wins:** Consider up-front how the programme might come to a close or you risk alienating and disappointing customers and undoing any positive results.

Loyalty currencies offered as part of the loyalty programme offer huge potential for brands. Amazon's loyalty currency, Amazon Coin, is available in eight countries and already has many customers investing hundreds of millions in the currency (BizCommunity, 2017).

But any financial rewards offered as part of your loyalty programme need to be carefully considered and their value proposition evaluated and assessed before implementation. Pick 'n Pay, a large grocery store chain in South Africa, drastically cut the rewards on its Smart Shopper loyalty programme in early 2017. Customers went from earning R1 for each R100 spent, to earning R1 for each R200 spent. The initially generous loyalty program and associated loyalty currency was impacting on the business' bottom line. Such a radical change in reward levels did not go down well with customers, and the brand did experience some fall out. The impact of the programme on the business' operational costs should have been assessed and addressed earlier, rather than so many years after implementation leaving customers with a negative experience of the brand (Business Day, 2017).

Where loyalty programmes are built around straightforward points and rewards systems, they can also become a point of parity. A loyalty programme should deliver on value that is unique and central to your organisation. You don't want to be competing with your competitor on who can provide more points, which essentially means more discounts, and ends up being a competition based on price. The sum of the parts of your loyalty programme should be difficult for a competitor to replicate.

Cryptocurrencies

Like loyalty currencies, cryptocurrencies, are also based in the digital world, and not tied to a central banking authority. Cryptocurrencies, like Bitcoin, were developed as a means of facilitating electronic payments online using a peer-to-peer network that was not managed by a server or central authority. Essentially, cryptocurrencies are digital money created from code. The data is encrypted and encoded to signify a single unit of currency. Such currencies are not secured by people or by trust, but by pure mathematics – making it a much more secure system that is not impacted by central banks and monetary supply. It is also almost immune to corruption. As well as Bitcoin, there is Ripple, Litecoin, Ethereum and Monero, to name a few (Blockgeeks, 2016).

These digital currencies, both universal cryptocurrencies and loyalty currencies, are challenging the traditional banking and international monetary system. Individuals are losing trust in banks and national governments' roles in monetary policy.

To learn more about cryptocurrencies visit: https://blockgeeks.com/guides/ what-is-cryptocurrency/

Apps

CRM apps are a great step forward in customer relationship management. They help to track customer contact info, as well as which members of your team they interacted with, their emails, and positions, as well as the last conversation the customer had with your company. Larger companies make use of software tools like Salesforce, but the high price tag, makes the software unattainable for small businesses and start-ups.

CRM apps like HubSpot CRM, Zoho CRM and Intercom are popular choices. If you're looking for a full-featured team CRM, HubSpot works for up to 1 million contacts and integrates with Gmail or Microsoft Outlook. Google contacts is a nice simple choice that works inside of Gmail and is ideal for smaller and start-up businesses. Intercom is a CRM that focuses on what people view on your site, so that you can track what they are likely to purchase. It links user behaviour to user profiles and the paid options include chat options allowing you to chat directly with customers online. Zoho is a great choice if you already use Zoho software.

Apps are making CRM easier by managing your contacts and tracking their interactions with your brand. They continue to get better and better, and brands should be making use of these useful tools.

Apps for payment services

As well as CRM apps, brands can also develop loyalty apps that enable payment. Brand specific apps that enable purchases are becoming a preferred means of payment. Payments through Starbucks' app have begun to account for more than 50% of Starbuck's revenue in 2017. Over 60% of millennials are happy to use apps to purchase products in store, which is changing the landscape of loyalty currencies and how such currencies are managed by brands (BizCommunity, 2017). More and more brands are offering payment gateways and even credit and microloans through their apps. This is impacting on how customers view brands as service providers, and greatly changing how they see banks and traditional monetary institutions.

SMS

SMS is a handy tool for communicating with customers about product delivery and updating them about specials and promotions. As with all mobile channels you will have access to your customer exactly where they are at that moment, and in a very personal space. So use this channel responsibly and only when you have permission to do so. Sending endless SMS can lead to customers removing themselves from your SMS contact list and could give that customer a negative perception of your brand.

Live chat

Note

See more about SMS and Apps as marketing tools in the Mobile Channels and Apps chapter.

Having the ability to chat to your customers when they are on your site is very useful in addressing customer queries immediately and can lead to valuable conversions. Real live customer service agents or sales people can converse directly with customers addressing any concerns easily and directly, or selling them any products they may be browsing at that moment. Live chat offers many benefits, including improved conversions, SEO, reduced average order times, increased awareness of additional products, efficient management of issues, and reduced overhead costs. Cost per contact is much lower than call centre or in-store customer assistance.

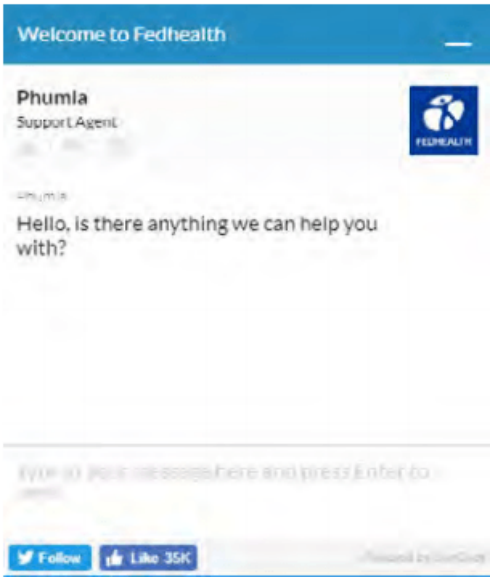


Figure 14.6.2: The Live chat feature on Fedhealth *Adapted From Screenshot. Fedhealth 2017*

Various providers offer live chat functionality to websites, such as Intercom, Pure Chat, Live Chat, Live Agent, and Freshdesk. It is becoming increasingly common to have live chat on brand sites, and customers that expect to find live chat and don't, could walk away from your brand. Just like not being on Facebook could be detrimental to your band, because customers expect all credible businesses to be on the social network, not having a live chat could also negatively impact on customer's perception of your brand as a viable business.

Be wary of using chat bots to address clients on live chat. Customers dislike robotic responses and want to feel heard and acknowledged by a real person. So, although chat bots offer great solutions to CRM at large scale, their use should be carefully considered against customer response and attitude to communicating with a bot.

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14.7: Case study - Amazon Prime

One-line summary

Amazon Prime has become one of the largest and best loyalty programmes in recent years, despite not using point systems and oversimplified projections of loyalty. They provide consumers real value by addressing their needs for instant gratification and exclusivity, while streamlining the customer experience and seeing a substantial financial return for the company.



Figure 14.7.1: Call to action to sign up for Prime on Amazon's home page *Adapted From Screenshot, Amazon 2017*

The problem

Amazon noticed that shipping was often a stumbling block when it came to completing purchases. If shipping took too long, users would drop out of the purchase. Similarly, if users purchased an item that was less than the minimum to receive free shipping they would also abandon the purchase. They needed to somehow streamline this process, so that customers would complete their purchases.

They considered a loyalty program that would address these two aspects, but knew that customers are inundated with loyalty programmes that offer cash-backs and promotions. Every retailer, bank and service provider all provide some form of loyalty programme that is very similar to all the others.

Amazon noted that many loyalty programmes fail because they don't meet the needs of the customer and promise delayed gratification. They offer customers nothing new nor anything they can derive any real benefit from in the short term. Customers have to build up points and cashbacks and wait to receive their reward. Many customers have become wary of loyalty programs, and see them as just another way to extort more money from consumers.

Customers need something that offer real benefits, and that they are willing to pay US$ 99 a year for. They want real value immediately and not something they need to wait months or years to see any benefit from.

The solution

Amazon Prime provides its customers with what they really want and need from the brand. It has created a program that is designed to meet customer's need for instant gratification and removed the stumbling blocks in the purchase process. Prime members receive next day delivery on all items, and do not need any minimum value in their shopping carts to receive free shipping. They reap the benefits of the program immediately and every time they shop online.

Instead of making these shipping features free, Amazon Prime made the service part of an exclusive loyalty programme that users had to pay a yearly fee to benefit from. So, in addition to tapping into instant gratification, Amazon Prime also made use of customers' want to be involved in something exclusive, that would set them apart from general customers. As well as shipping benefits, Amazon Prime users would get access to exclusive deals and discounts, as well as first option on new products. Prime members get to see and purchase products before they are made available to other customers.

To ensure they provided perceived real value, Amazon also included access to their entire library of Amazon Prime videos in the Prime membership. Although the fledging library cannot rival Netflix, offering the content free enables it to gain an audience to test out content and gain insights for future content development. This means that the customer receives great value in the form of online viewing content, and the brand gains invaluable input that it can use to fuel further development.



Figure 14.7.2: The highlighted benefits of Amazon Prime on Amazon's home page *Adapted From Screenshot, Amazon 2017*

Amazon Prime is more than a loyalty or a rewards program, it is a privilege program that taps into customers' need for feeling important and special, as well as addressing stumbling blocks in the purchase process, and meeting our growing need for instant reward (YourStory, 2017).

The results

Amazon has created a truly extraordinary loyalty programme that users are prepared to pay for. By providing customers with what they need and streamlining the customer experience, Amazon has demonstrated that gimmicks and cash backs are not the solution for loyalty programmes. Amazon Prime saw rapid adoption in the US, and still sees a 40% increase in subscriptions year on year even though the loyalty program is nearly 12 years old. As of early 2017, 60% of Amazon's US customers have a Prime membership, with the total number of Prime subscribers hitting 80 million. Prime members also spend nearly double (US$ 1 300) what non-Prime members do (US$ 700) per year (Business Insider, 2017). The programme has been a huge success for the brand, with revenue from Prime alone making up US$ 6.4 billion in 2016. The programme is so successful that revenue from subscriptions alone is nearly enough to cover the largest cost of the company, its overall shipping costs (Bloomberg, 2017).

Essentially, establishing customer loyalty is about providing users with an experience that is simply better than anything else, so that users change their purchase behaviour to favouring your brand. And that is exactly what Amazon has been able to achieve through Prime (LooseThreads, 2017).

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14.8: The bigger picture

Managing customer relationships should be built into every marketing tactic and activity you perform, especially if your organisation has adopted CRM as an ongoing strategy to drive customer retention.

Successful email marketing is built on two very basic customer needs: privacy and permission. The very first step in using email to communicate with a customer is gaining their permission. Data mining and segmenting customer databases allows email marketing to be tailored and personalised. Email is often the primary point of contact for service-related messages.

Online advertising is a double-edged sword when it comes to CRM. It can be a very effective acquisition tool for new customers, but intrusive advertising can attract attention for all the wrong reasons. Effective online advertising speaks to customers' needs and presents solutions to them, attracting attention without being overly intrusive. The key is to be relevant and useful wherever possible.

Search engine optimisation and search advertising start with customer intent. Existing customer data can indicate where to focus search engine marketing efforts, especially when it comes to analysing how well a website caters to the intent indicated by a customer's search term. Social media marketing is based on customer needs and preferences. It is also a powerful tool for turning delighted customers (who are expressive online) into advocates for an organisation. Social media creates new communication channels for an organisation, enabling discussions and customer service to take place where the customer feels most comfortable.

Effective web development and design starts with understanding and catering for customer needs, and should focus on the experience of the web user. Designing for customers first and foremost gives web visitors a seamless experience. CRM data can tell you what your customers need, and web experiences can support the customer journey. Web designers and developers can also create sophisticated customer service portals to manage CRM, such as the Nike+ support page: nikeplus.nike.com/plus/support.

Through all of the digital marketing tactics, effective analytics is the most useful CRM tool. It allows each channel to be measured on its merits, and the customers acquired by each channel can be analysed.

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14.10: Social CRM

Widespread social media usage means that CRM has to be conducted on social to deliver an all-round experience for the customer. Not only should social media be integrated into any existing CRM strategy and looked at from a touchpoint and channel perspective, but social media can also be used to drive CRM.



Figure 14.10.1: Stats on poor customer service cost *Adapted From CxSocial, 2016*

Social media platforms allow customers to easily share their brand experience (good or bad) with their online social connections, who in turn can share this experience on. This means a potential word-of-mouth audience of millions could witness a single user's brand experience and weigh in on the situation.

Customers place a great deal of value on the opinions of their peers, and are more likely to look favourably on a brand, product or service if a peer has recommended or praised it.

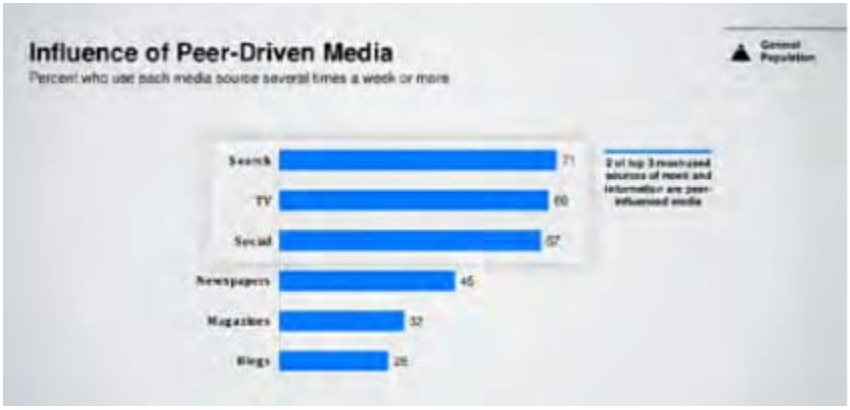


Figure 14.10.2: Influence of Peer-Driven Media *Adapted From Edleman. 2016*

Brands have realised that they need to leverage this in their CRM strategies and now understand that communication is not one way (from brand to consumer), or even two way (between consumer and brand) but multi-directional (brand to consumer, consumer to brand, consumer to consumer).

The convergence of social media with CRM has been termed social CRM or CRM 2.0, and has developed into a field on its own.

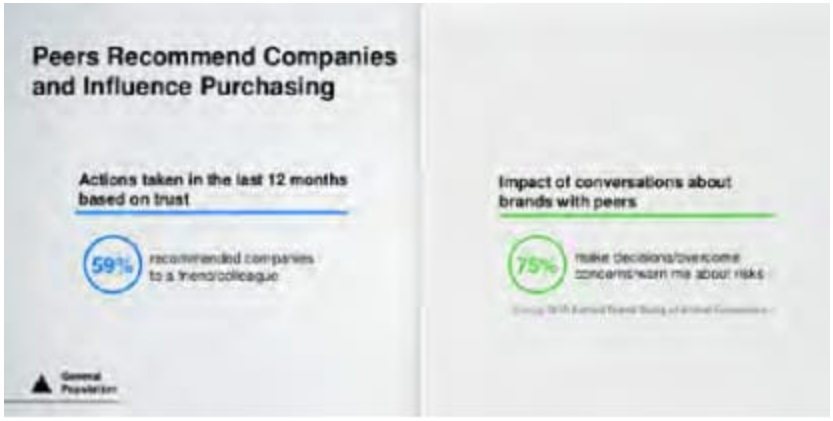


Figure 14.10.3: Peers Recommend Companies and Influence Purchasing *Adapted From Edleman. 2016*

Social CRM and support

Social customers are increasingly turning to social media channels for support. With the immediate accessibility offered through mobile devices, they see this as a convenient channel to communicate with brands. This means that brands need to respond quickly and transparently to consumers' questions, gripes and even compliments. A support query going unanswered on Twitter, for instance, is likely to cause frustration for the consumer, and prompt them to take a situation that is already visible to other consumers even further, potentially causing a brand crisis.



Figure 14.10.4: Social CRM is valuable *Adapted From Edelman, 2016*

Brands should carefully consider whether all social media channels are appropriate for them, and be prepared for any eventuality. Brands that are well liked will generally have positive responses on social media, those that receive a mediocre response from consumers will have a bit of a mixed bag, but those that have a lot of support issues are likely to experience very large numbers of complaints that need to be addressed.

Social support staff should have access to all the historical data relating to customer issues such as all the data collected about previous complaints and reference numbers. These channels make customer support public. In this way, they can respond directly to the consumer in the social channel that they've selected and escalate the problem appropriately.

Social CRM and online monitoring

Social CRM can also make use of online reputation management and monitoring tools. Online monitoring, or reputation management, entails knowing what is being said about your organisation and ensuring that you are present in or leading the conversation.

By using these tools, brands can rate and sort these mentions based on their sentiment. This allows them to effectively test the

temperature of the online community's feeling towards the brand, which can then guide any future action.

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14.11: Step-by-step guide to implementing a CRM strategy

Step 1. Conduct a business needs analysis and develop a problem statement

A major part of determining where to begin with a CRM implementation is having a clear understanding of the business needs, and where CRM would most benefit the organisation. CRM touches on sales, marketing, customer service and support both online and offline. It's important to review the needs of each business area so that you can determine your strategy for CRM.

Ideally you should have individual goals for each department and all members within the organisation should buy in to the strategy in order to drive it successfully, from the highest rank to the lowest. Implementing successful CRM across the organisation is a process, with stakeholders making decisions collectively and sharing their views and needs. Decisions should be based on realistic budgets and resources and full calculations carried out before any kind of loyalty currency is decided upon. Remember the Smart Shopper example from Pick n Pay above, and how not carefully considering how rewards may impact on your bottom line could cause problems later on.

Step 2. Understand customer needs

CRM is about the customer. You might have identified a range of business needs, but what about the needs of the customer?

Two elements of CRM in particular, service delivery and customer support, are actually all about meeting the needs of the customer. And what's the best way of determining customer needs? By asking them, of course. There are various ways to find out what customers want, but in all of them, it is important to listen. Use online monitoring tools and insights from social media to gather a more rounded view of what your customers think, feel and want. Look at past behaviour, churn rates, and successes. It may be worth doing a detailed data mining exercise to understand which of your customers is the most valuable and why.

Step 3. Set objectives and measurements of success

CRM is a long-term commitment and you need to consider a long-term approach. Depending on the business needs, you may decide to focus on communications objectives, sales objectives, business objectives, or all three. Objectives and success measures could include:

- Increasing customer numbers: Sales objective/business objective
- Increasing profitability per customer: Business objective
- Increasing market share: Sales objectives
- Improving responses to campaigns: Communication objective
- Raising customer satisfaction: Business objective
- Improving end-to-end integration of the sales process cycle: Communication objective.

The metrics you select for measurement will depend on these objectives. There are numerous metrics that you can choose from when measuring your performance, and the actual metrics you choose are generally referred to as your key performance indicators (KPIs).

> **Note**
>
> Read more about this in the Data Analytics chapter.

Step 4. Develop your CRM strategy, and determine how you will implement it

Once you've identified all of the objectives of your CRM implementation, you will need to determine how you are actually going to roll it out. What channels will you use? What touchpoints will you leverage? What data will you need for this?

Next, you need to determine which tools you will use to gather this data and how you will implement your initiatives across these channels. Don't forget that you need to communicate with your internal stakeholders before you launch the initiative to your external ones.

You will need to make choices based on what is available to you, or what you intend to embrace. The digital space offers a range of innovative spaces for CRM delivery; you simply need to get creative in your execution.

Step 5. Choose the right tools

There are lots of excellent CRM tools available, but these are useless without a clear CRM strategy in place. You can only select your tools once you know what your objectives are, what touchpoints and channels you are going to utilise, and what data you need to collect and analyse.

CRM systems that gather information on customer preferences and needs, as well as information on competitors, and in the industry in general, let organisations focus on providing customer solutions instead of simply pushing products.

We've outlined a host of options in the Tools of the trade section on the next page.

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14.12: Tools of the trade

Collaborative CRM tools

Collaborative CRM refers to a process that combines customer data across all facets of a company. For example, queries regularly submitted to the technical support or customer service arm of a business can be used to inform product development and website content. Instead of various departments collecting their own customer data and using this in isolation, data is collated so that all channels make informed decisions based on the holistic customer experience.

MindTouch (www.mindtouch.com) is an example of a CRM product that offers collaborative authoring. This means that multiple users can simultaneously edit shared documents while maintaining an audit trail and version control.

Social CRM tools

Social CRM tools perform a number of functions, from standardising the collection of data from social media channels to automatically posting links and accepting friend requests. These tools can also be used to identify customer sentiment within social media channels.

BrandsEye (www.brandseye.com) and Simplify360 (www.simplify360.com) are examples of social CRM listening tools that collect data on brand mentions across social media channels online, in real time.

Operational CRM tools

Operational CRM tools deal with the most obvious channels that relate to customers: the front end of a business and its customer service. From a web technology point of view, operational CRM informs the website a customer sees as well as their entire online user experience.

Two examples of operational CRM tools are OnContact (www.oncontact.com) and Zoho CRM (www.zoho.com/crm).

Sales and marketing automation CRM tools

Sales force automation (www.salesforce.com) uses CRM software to manage sales cycles and to collect customer sales data. The software enables businesses to track leads, schedule transactions and communications with potential and existing customers, and generate detailed reporting on the sales process.

Marketing automation tools identify current customers and use their response information to manage email marketing lists. The tools can also identify prospects, as well as unhappy customers.

HubSpot (www.hubspot.com) offers a marketing automation tool that allows companies to generate and send behaviour-driven emails.

Analytical CRM tools Analytical CRM tools allow companies to record, save, and investigate customer data to better understand customers through their behaviour. For instance, data collected about the nature of visits to your website can be used to make informed decisions about where to focus attention based on customer behaviour. Past purchasing behaviour of customers can be analysed to predict future purchasing behaviour. Data can be used to segment customers and tailor communications. These tools can help target marketing campaigns at customers and predict future sales and customer spending.

KXEN (www.kxen.com) is a popular analytical CRM tool with the ability to forecast customer behaviour and shed light on customer preferences and spending power. It also allows you to tailor marketing campaigns to specific customers, segmented by various demographics.

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14.E: Customer relationship management(Exercises)

Case study questions

1. Why do you think Amazon Prime has been so successful for so many years, when most other programmes lose their allure?
2. What aspect of loyalty does Prime tap into?
3. What do you think of Amazon's decision to include their video streaming as part of their Prime membership?

Chapter questions

1. How do you think CRM changed or evolved as social media rose to popularity?
2. Why do customers respond so positively to personalised communication?
3. What ethical problems do you think customers might raise with regards to behavioural tracking?

Further reading

www.insidecrm.com – This useful website regularly posts white papers and reports breaking down updates and developments in the field of CRM.

churchofcustomer.com/ – This useful blog regularly features guest writers and experts in the field of social media and CRM.

www.cluetrain.com – Home of the Cluetrain Manifesto, a set of guiding principles geared towards conducting business in the digital world.

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14.S: Customer relationship management(Summary)

Customer relationship management is the cornerstone of your interactions with customers. Digital technology makes the process of discovering key insights seamless, effective and very useful, but CRM cannot be restricted to only digital channels as customer interactions happen offline too. There are many benefits to implementing a CRM strategy from reduced customer service costs to happier customers, and quicker, more tailored, and effective communications.

Naturally, understanding customers is the biggest outcome of CRM and this understanding leads to meeting their needs much more effectively, which in turn has direct bottom-line benefits for the brand.

There are many facets to CRM that you should consider before deciding how you will approach it. The key ones are:

- Brand touchpoints: How do customers interact with the brand, and vice versa?
- The tools you need for your business: Operational CRM, analytical CRM, collaborative
- CRM and sales force automation are the main categories.
- What channels are available to you to communicate with your clients?
- Implementations: CRM can be implemented for sales, marketing and customer support and service fulfilment.
- What are the steps you need to take within your organisation to ensure a successful CRM strategy?
- What cost are you looking at and what return on investment are you expecting?
- Your long-term aims: CRM is never a short-term solution.
- What are your data capabilities and needs: Are you gathering the correct data, storing it correctly, updating it constantly and then analysing it for insights?

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15: RETAIN - CONTENT MARKETING STRATEGY

Learning Objectives

In this chapter, you will learn:

- To understand the role of content marketing strategy within your marketing plan.
- To be familiar with the steps involved in developing your content marketing strategy.
- To recognise some models for understanding how types of content are absorbed or experienced by your target audience.

15.1: Introduction

15.2: Key terms and concepts

15.3: Defining content marketing

15.4: Strategic building blocks

15.5: Content creation

15.6: Content channel distribution

15.7: The bigger picture

15.8: References

15.9: Tools of the trade

15.10: Advantages and challenges

15.11: Case study - Intel and Toshiba

15.E: Content marketing strategy

15.S: Content marketing strategy(Summary)

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15.1: Introduction

While the phrase ‘content is king’ has been referenced for some time, it is only in the last decade that content marketing strategy has been solidified into a discipline of its own. Defining content marketing strategy can be tricky, however, with some practitioners focusing more on the role it plays in information architecture and others believing that it should be considered on a campaign by campaign basis.

This chapter looks at content marketing strategy from a holistic perspective, as a process that includes an understanding of all the content your brand is creating, those for whom it is intended, and to what purpose. Content marketing is important for positioning your brand in the minds of consumers. As a content marketer, you need to understand the brand and consumer context and be able to craft appropriate content based on user receptiveness and channel-appropriateness. You also need to select the best route to customer in terms of tactics, and understand how content marketing fits and contributes to your overall marketing strategy. Ultimately this supports the design of communication that impacts people enough to make them want to share the content on.

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15.2: Key terms and concepts

Table 15.2.1

Term	Definition
Algorithm	An algorithm is a mathematical, computational or statistical method pre-determined to take a number of variables into account and output a single, quantifiable result that is a function of all the variables. A good example of a commonly used algorithm is the one used by Google to determine which pages rank more highly on SERPs.
Content audit	An examination and evaluation of the existing content which a brand publishes.
Editor	A person who determines the ultimate content of copy, traditionally understood to be in the newspaper, magazine or publishing industry context.
Information architecture	The way data and content are organised, structured, and labelled to support usability.
Persona	In this context, a character created to define a group of users in order to speak to them as though they were a unique user. Usually a hypothetical character created to represent and personify a set of traits.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.

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15.3: Defining content marketing

Content marketing is an umbrella term which focuses on matching content (information, inspiration, or entertainment) to your customer needs at whichever stage they are in the buying cycle or customer journey. Unlike TV, where the advertiser pushes messages to a captive audience, the focus is on engaging content, which means that marketers must think like publishers (attracting an audience) rather than seeing themselves as advertisers (buying an audience) of a product. The Internet has, in many respects, cut out the middle man. Consumers and brands can now connect directly through a number of easily accessible online platforms.

The Content Marketing Institute offers the following definition:

Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearlydefined audience — and, ultimately, to drive profitable customer action (Content Marketing Institute, 2017).

This definition applies to all the spaces in which you share content both traditional and digital. This includes printed magazines, booklets, and promotional material as well as your social media space, website, campaigns, competitions, and your company blog. The way in which that information is shared is also important.

Kristina Halvorson suggests the model illustrated below for approaching the different areas of content marketing strategy.



Figure 15.3.1: A model explaining content strategy *Adapted with permission, Kristina Halvorsen, 2010*

Content components

Substance: Who are you trying to reach, and why?

Structure: Where is your content? How is it organised? How do people find your content?

People components

Workflow: How does your content happen?

Governance: Politics, guidelines and standards that your brand operates in (Halvorson, 2010).

As you can see in the above discussion, Halvorson suggests that one consider the bigger picture of content creation rather than

just the product which is the end result. Content marketing looks at staff, tools, processes, and outcomes. The end goal for these processes isconversion. All content should be created with a strategic outcome in mind. Such outcomes could include talkability, referral, affinity, and ultimately purchase or increased usage of your product or service.

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15.4: Strategic building blocks

Translating your brand essence

The brand essence sums up the unique attributes of a brand and the basis for its emotional connection with customers. Remember your emotional connection with your customer is the very things that differentiates your brand from your competitors. Your brand essence should assist in defining a tone of voice for your brand and the style in which it engages with its customers. The brand essence can be a useful guide for ensuring that the content you create (and your marketing activity) represents the brand appropriately. You can relate this to your brand story. What is your reason for being? How do you connect that with the interests of your customers? What is the value you add to your customers' lives? Is it convenience, health, status?

Consider a brand like Mercedes Benz. Their essential product is transportation, but the brand offers so much more than that to its customers. For example, it provides a sense of safety and security, customers know they are driving a car with the latest safety technology. But the brand's most powerful aspect is the sense of achievement and status that owning a Mercedes Benz provides. The value of the brand is less about the product itself and transporting passengers, and more about the feeling and status the customer gets by owning the product.

Will It Blend? is a video series by Blendtec which builds on this principle. Blendtec produce industrial blenders. Their value proposition is that they can blend anything, and their very popular videos demonstrate this.



Figure 15.4.1: Blendtec produce a series of entertaining videos focused on blending objects discussed in popular culture, such as iPhones
Adapted From Screenshot, Blendtec, n.d.

Market research and consumer personas

The sweet spot for content marketing lies in an intercept between the marketing goals of a brand, the brand personality as it guides and differentiates that brand in the marketplace, and the consumer motivation for paying any attention to a brand at all. One device that is used in addressing consumer needs is the development of a consumer persona.

A persona is a profile that a writer creates to embody the aggregated characteristics of the target audience for whom he or she is writing. It helps to personalise the brand. Personas are based on the profile of users of your content. Creating a profile is all about considering the characteristics of your customers and their needs and desires. For example, a brand like Philadelphia Cream Cheese could have a couple of customer personas. A busy father, who works full time, but still wants to provide healthy and nutritious lunches for his family. Or a young female foodie, who wants to try new recipes she finds online from international celebrity chefs to impress her friends at dinner parties. Each of these would require slightly different approaches when developing content. Both would benefit from videos featuring recipes, but one would appreciate regular basic options for lunchboxes, and the other a celebrity endorsement or even a celebrity hosted video of finer and more elaborate meals.

It's important to focus on the motivations of the persona that you may create, rather than exterior signifiers that lead to the creation of a stereotype. The persona assists you in segmenting and understanding your target market and is a framework through which you can guide any content that you create.

Creating content themes

Linked to the brand identity are certain themes or concepts. These are areas of focus that support the creation of content that match a consumer's interest. These themes must be true to the brand essence, not focused directly on sales, and should also speak to the interests of the audience.

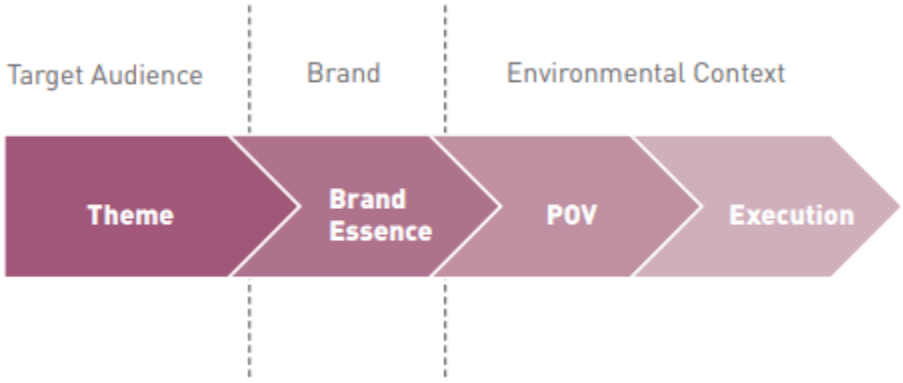


Figure 15.4.2: Content themes can be considered in line with the brand's essence, and then situated within the context of the reader *Adapted From Stokes, 2013*

For Coca-Cola, for example, consumer interests filtered through the brand essence of 'Coke brings joy' could result in the following themes:

Friendship

Sharing is caring

Spreading smiles.

These themes are then used as the basis on which to develop content ideas.



Figure 15.4.3: Coca-Cola express their brand essence in all of their communications, as demonstrated in the Tweet above *Adapted From Screenshot, Twitter 2013*

In the above tweet, we can see how a particular content theme was translated into a question that is focused on relationships and family. It also encourages engagement from the audience by asking for their input.

Another example which demonstrates this is how Corona brought their brand essence to life through an interactive documentary. The essence of the brand is to live the extraordinary, and provide amazing experiences to its customers. The documentary depicted a group of people from Bulin in China, officially the town furthest away from any ocean in the world, encountering the ocean for the very first time. A truly extraordinary and amazing experience, facilitated by Corona. You can view it here:

https://www.youtube.com/watch?v=V8ELAv3Ovho.

Matching content formats to objectives

Information can be presented through any number of mediums, which is both an opportunity and a challenge faced by content marketers. Traditional print distribution allows for magazines, pamphlets and even events. Digital distribution allows for videos, images, interactive infographics, GIFs, live photos, live video, cinemagraphs, and any number of other formats. To gain and keep the attention of consumers/users, it's sometimes not enough to rely simply on text-based forms of content. The role of the content marketer is to select the right medium based on overall objectives, production capabilities, and the needs of the audience. Consider the illustration below.



Figure 15.4.4: Different forms of content will support different objectives *Adapted from Bosomworth, 2012*

As discussed in the Strategy and context chapter, determining your objectives is an essential part of your marketing planning, and should feed into your content marketing strategy, and ultimately the business strategy. Understanding the journey your consumers go through as they approach your ultimate sales goal will enable you to match content formats to their needs. A humorous video may be successful in initially making potential customers aware of your brand. However, once you have their attention, a research paper or useful case study could be more effective in convincing them that you are the best choice in the market.

Price Waterhouse Cooper (PWC) is one of the largest international financial consulting firms, offering a range of financial services and advice across the globe. Every year they publish valuable content and guides to assist their customers with tax and wealth management. You can find the 2017 guide here: www.pwc. com/us/en/private-company-services/publications/tax-wealth-managementguide.html

There are many examples of online journalism using multimedia to convey information most effectively to their users. The New York Times has presented a number of different methods for conveying complex information in an engaging manner. 'Snow Fall' by John Branch is one example: http://www.nytimes.com/ projects/2012/snow-fall/#/?part=tunnel-creek.

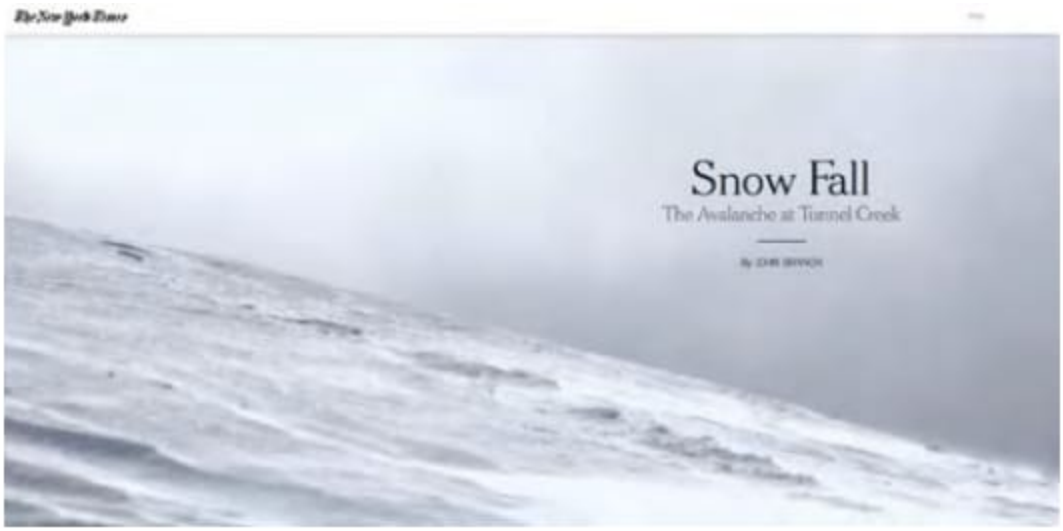


Figure 15.4.5: 'The New York Times' is a media brand that has embraced interactive media features for presenting complex news stories
Adapted From Screenshot, New York Times, 2013

The New York Times also often publishes infographics that demonstrate this principle powerfully.

Because users consume content across multiple screens, multimedia is necessary to ensure you keep the audience engaged, and they do not get bored with your content. See this infographic on the importance of exploring different types of multimedia with content marketing: blog.marketingv2.com/the-impo...eting-strategy .

To take advantage of these various forms of content delivery, it is necessary to build the correct capabilities. But how do you determine what forms of content you need?

The content audit

Once you have established your marketing goals, your brand personality and a guiding understanding of who you are trying to reach, the content audit is a necessary but sometimes laborious next step. The content audit involves an audit of all the existing content supplied by the brand such as the website, white papers, articles, videos, and content shared on social media sites can all be considered.

An assessment can then be made of how well these pieces of content match the strategic needs of the brand, its audience, and the appropriateness to the chosen channel.

While you can either thoroughly immerse yourself in this process or attempt to get a more time-efficient overview, the goal is to map what is currently on offer versus what is needed to achieve the strategic objective. It is important not just to understand what you have and who accesses it, but also how it is currently organised, through which channels, and how often it is accessed by your audience.

Many practitioners suggest the use of a spreadsheet to achieve this. Content can be found to be either mismatched to the goals of the organisation, or spot on. Most importantly, you can establish what is missing. Are your customer needs being addressed? Where do the opportunities lie?

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15.5: Content creation

Learning from publishers

Referring to a brand as publisher refers to expanding the function of the marketer or brand manager, and opening up additional opportunities to influence and/or convert. Rather than focusing on the immediate sale or conversion, a publisher focuses on value and interest for the user, and building a relationship based on supplying information, inspiration, or entertainment that suits the customer's needs. Makeup. com by L'Oreal is an oft-cited example of a brand publishing useful tips and content that does not link to a product or sales directly, but demonstrates how the brand can facilitate the lifestyle consumers desire or aspire to. In content marketing a brand has to give customers more than just the product or service.

Resource planning – thinking like a publisher

Content marketing touches on a number of departments in an organisation. Marketing, sales, customer service, corporate communications, human resources, and website management teams should all be aware of the content marketing strategy for a business. Co-ordinating content between these teams can be challenging if not impossible if turnaround times are tight. This is why it is important not only to look at where content production should live in your organisation, but also to map the workflow of content creation, an essential function. Are designers involved? Where does quality control take place? Where can a piece of content be adapted and reused on a different distribution channel?

Some organisations opt to have a central role for someone to oversee content; others build in-house departments. Factors to consider are budget, creative control, approval and sign off processes, objective perspectives, and full-time versus freelance resources. Whether you are outsourcing to a publishing house, or training a team in house, the decision must be made and planned for so that workflow can be mapped to facilitate your strategic needs.

Always on content planning

Given that a large part of the global population is constantly engaging with content via various digital devices and platforms, it is necessary to consider content creation in terms of not only short campaign bursts, but ongoing delivery and engagement. Consider the illustration below.

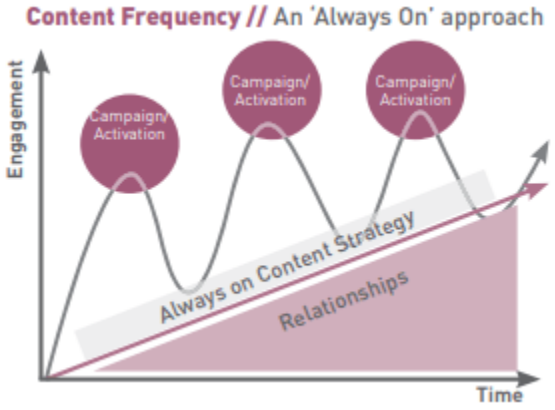


Figure 15.5.1: An always-on-content strategy approach builds relationships and engagement *Adapted From Stokes, 2013*

By constantly engaging with audiences, which is well suited to social media, for example, it is possible to build and maintain a relationship with customers/users. Consider the image above, where constant engagement is built by a constant presence, and amplified by shorter-term campaigns.

Content models

Your organisation's content requirements and objectives should determine the structure of your content teams. Do you have a need for ongoing content creation, or are there less frequent high-input forms of content that will benefit your organisation? There are many models which are constantly evolving, so invest in some research around what will suit your organisation. We have outlined two approaches below.

Stock and flow

Stock content refers to bigger, beautiful assets that require more investment and age well, meaning that they will be interesting in six months as well as today. 'Inside Chanel' by Chanel, is an example of this. High-production value documentary type videos are created and sponsored by the brand to achieve awareness and develop brand affinity across its target market. You can visit the Chanel channel on YouTube here: https://www.youtube.com/user/CHANEL



Figure 15.5.2: The Time of Chanel – Inside Chanel. Stock videos created to achieve awareness and brand affinity *Adapted From Screenshot, YouTube Inside Chanel, 2017*

Flow content has a lower production value and a quicker production and publishing time frame. Images depicting what is going on at a business on any given day, for example, freshly baked goods at a bakery, can be placed in this category. Weekly or even daily blogs as well as event and holiday themed content would all be considered flow.

Both types of content should be considered for balancing out a content strategy. It can also be useful to consider destination and distributed content. Content which you are either sending out to the world through various platforms and networks, or which pulls your user towards a page on your website or an article on your blog. Rather than focusing solely on driving users to your owned media spaces, such as your website, consider how to create content that engages with your target audience in the spaces and platforms they use online.

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15.6: Content channel distribution

Algorithmic curation

Algorithmic curation is a term that refers to the algorithms platforms have created for dealing with information overload. Various platforms, like Facebook,Twitter, and the search engine Google, use algorithms to filter out the amount of information that is delivered to users. Each algorithm will use a number of factors to determine what is actually relevant and interesting to the user doing a search or looking at their news feed.

One of the factors that influences whether a piece of content is considered relevant is how much an individual engages with the brand's presence on that platform over time. Posts shared by a Facebook Page, for example, may reach only users who have previously engaged with posts from that page through commenting or liking. It is therefore important to create content that encourages engagement and sharing.

Increasingly SEO and content marketing have to work together if they are to reach their audience and achieve their objectives. Without good content, SEO will struggle, and without SEO even good content will not be seen. SEO approaches content differently to content marketing. SEO wants the content as narrow and focused as possible, so that they can give the right answer to the right user while users are searching. It also recognises the need for enjoyable shareable content as this improves search rankings and earns backlinks. Content marketers, on the other hand, prefer broader content, and focuses on the quality and exposing the content appropriately (Postan, 2016).

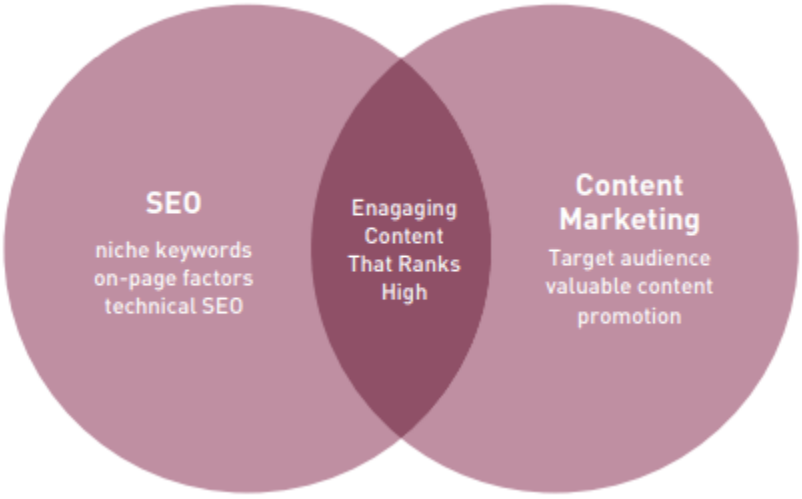


Figure 15.6.1: Engaging content that ranks highly is achieved when SEO and content marketing work together *Adapted From Outbrain, 2017*

Note

For more on aligning content marketing and SEO go to this blog post by Outbrain: www. outbrain.com/blog/ content-marketing-andseo

Understanding channels and platforms

Understanding the channels through which you share content is as important as the crafting of that content itself. Reaching people effectively will only be achieved if the medium supports the message and vice versa. Social media, email marketing, mobile marketing, and video marketing are just some disciplines that will form part of your content creation arsenal. The rest of this book is dedicated to best practice in communicating effectively through the various digital disciplines available to you.

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15.7: The bigger picture

Content is a significant component of many digital marketing disciplines. When creating content, you should always keep the principles of writing for the web in mind.

Email marketing relies on great content since most people suffer from email fatigue, they will only stop to read emails that they know are of high quality and that provide excellent content.

Social media marketing also depends on sharing relevant and valuable content with social fans. While your brand promise may get them to your social page, your ongoing stream of quality content will encourage them to interact and share, spreading the word about your company. If your content is great and really resonates with your audience, it could go viral.

Search engine optimisation is strongly influenced by the quality, frequency and value of content. Not only will search engines favour your site, but others will choose to link in to your content, creating a valuable referrer for your brand.

Video marketing is a whole new approach to content, in which you create dynamic and shareable videos specifically tailored to the interests and needs of your audience.

Mobile marketing also requires that you consider the unique requirements of your audiences across a series of devices. If you understand the role that each device plays in a user's life and buying cycle, you structure content according to user purpose and frame of mind.

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15.9: Tools of the trade

In order to support the ongoing production of interesting content, it is necessary to have some planning documents in place. Consider those outlined below.

Brand style guides

This document guides anyone creating content for a brand at any time. What is the tone of voice and brand personality? How is it best represented visually, and what are the brand colours and fonts? This can be a challenging document to put together, and it usually isn't the content marketer who is tasked with doing so, but is essential to aligning brand communications. It is also a document that tends to be 'live' as it is constantly updated as the brand and content landscapes evolve and new conventions need to come into play. Brand style guidelines are also referred to as Corporate Identity(CI) or Brand Identity (BI).

Content calendars

Content calendars assist the content marketer in planning the content they will be sharing, across which platforms, and when. The more advance planning is undertaken, the easier it is to react quickly to tactical opportunities.



Figure 15.9.1: A content calendar for social media *Adapted From Small Business Trends, n.d.*

Workflow map

A workflow map documents the path a piece of content takes when it is created. What are the steps in approval, how is it optimised for digital publishing, who has final sign off? Is it a duplicate of existing content, and where else can it be used? A workflow map assists you in streamlining this process.

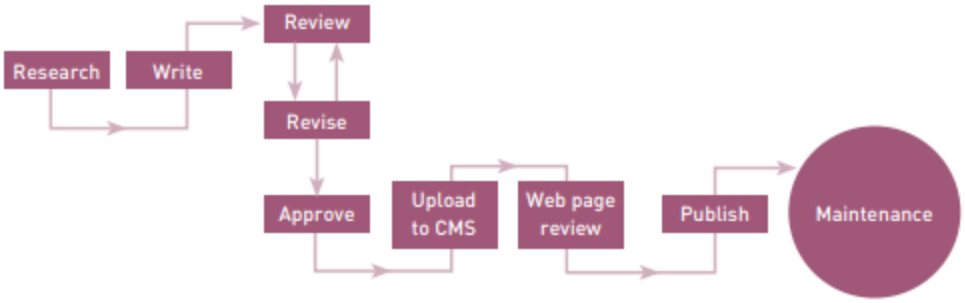


Figure 15.9.2: A content workflow mapping the development of content *Adapted From TBC*

Persona map

As discussed, the persona map assists content creators in focusing on those for whom they are in fact creating content, and what the motivations of consumers may be.



Figure 15.9.3: An example of a persona map *Adapted From UXPin, n.d.*

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15.10: Advantages and challenges

Content marketing can position your brand as an expert through the sharing of useful content in your specific field. It also enables you to reach the customer who has a fragmented attention span spread across many devices and content touchpoints.

One of the more powerful benefits, however, is that you can learn a lot about your target consumer through the content with which they do or do not engage. The more targeted and ongoing your content, the more data you can gather about how effectively you are reaching those you need to.

One of the great challenges in content marketing is providing content that is truly interesting and engaging to the right people with the right mix of subject matter and brand. Matching content to the required outcome for your strategic purposes takes dedication and focus. In the context of ongoing content production, it can also be a challenge to maintain levels of quality over time, which is why process and quality assurance steps must be put in place. Consider that the goal is not to create as much content as possible, rather it is to focus on relevance and content that matches strategic outcomes.

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15.11: Case study - Intel and Toshiba

One-line summary

Toshiba and Intel paired up to create an extremely successful social storytelling campaign that refreshed the 'Intel inside' slogan and boosted awareness of the new Ultrabook.

The problem

Intel and Toshiba both wanted to an opportunity to interact and raise awareness with younger consumers, aged 18–34 years old. They knew they didn't want a regular ad, but something that would really engage the audience and get them to interact with the brands.

The solution

An interactive social film called 'The Beauty inside'. The film starred real Hollywood stars and was a film about a character called Alex, who wakes up every day as a different person. On the inside he is the same, but on the outside, he looks like someone different. The story was about the fluid nature of identity and that despite outside appearances, it is what is inside that counts.



Figure 15.11.1: The Beauty Inside campaign for Intel and Toshiba *Adapted From Contently, 2016*

The campaign included a strong social element. Due to the changing nature of Alex, he could be played by anyone (male or female), and fans were invited to audition via the brand's Facebook application for the role. Those chosen would star in the professionally filmed episodes with real Hollywood players. Additional audience created content was also shared in the Alex story on the Facebook page.

Watch this video about this incredible case study:

https://www.youtube.com/watch?v=qyMQIMeSCVY or the full six episodes as one movie here: https://www.youtube.com/watch?v=rbNP_c0wUxE

The outcome

Over 26 fans were cast in the film as Alex, chosen from over 4 000 contenders. And an additional 50 Alexes were featured on the 'The Beauty Inside's Facebook Timeline. The content resonated with the audience, and the social nature of the film sparked engagement and shares.

The results of the campaign were:

- 70 million video views

- 97% YouTube approval rating
- 26 million social interactions
- 40% lift in brand perception for Toshiba
- 66% lift in brand perception for Intel
- Increase in sales of 300% during the event, when compared to previous weeks (Digital Training Academy, n.d.).

Despite being a few years old, this case study is a great example of how providing content with strong entertainment value to customers and engaging with them on an emotional and social level, can have dramatic results.

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15.E: Content marketing strategy

Case study questions

1. What is brand storytelling?
2. Why do you think Intel and Toshiba chose this option?
3. What in particular do you think drove the dramatic lift in brand perception for both brands?

Chapter questions

1. What is content marketing strategy? How does it compare to business strategy?
2. Why is the customer journey or buying cycle relevant to content marketing strategy?
3. How do you decide what new forms of content your brand needs?

Further reading

contentstrategy.com/ – Content strategy for the web.

http://contentmarketinginstitute.com/blog/ – the official blog of the Content Marketing Institute

the-cma.com – The Content marketing Association website. News, research and case studies on Content marketing.

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15.S: Content marketing strategy(Summary)

Content marketing presents a pull mechanism for the marketer rather than a push one. It's a gentler approach to traditional advertising and product or price promotions. Brands must consider their brand identity and the market they are trying to reach in order to create targeted and valuable brand content that delivers on strategic objectives.

It's about more than creating a piece of content. Content marketing strategy looks at how you structure your organisation to create that content, and how you match specific types of content and methods of delivery for achieving strategic outcomes.

These ideas need to resonate with people rather than simply existing across an array of media with which they are presented.

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16: RETAIN - SOCIAL MEDIA PLATFORMS

Learning Objectives

In this chapter, you will learn:

- About the largest and most popular social media platforms.
- How to track, monitor and measure your social media marketing success.
- The best ways to engage with audiences on social media.

16.1: Introduction

16.2: Key terms and concepts

16.3: Marketing with social media

16.4: Facebook

16.5: YouTube

16.6: Instagram

16.7: Pinterest

16.8: Other social media options

16.9: Analytics for social media

16.10: Selecting the appropriate platform

16.11: Rules of engagement

16.12: Advantages and challenges

16.13: Case Study - Harley-Davidson

16.14: The bigger picture

16.15: References

16.16: Twitter

16.17: Snapchat

16.18: LinkedIn

16.E: Social media platforms(Exercises)

16.S: Social media platforms(Summary)

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16.1: Introduction

Social media is such an ever-present part of our lives, that it is nearly impossible to engage in online activity without coming into contact with it at one point or another. It is also becoming difficult to avoid social media in offline channels as well - consider hashtags and snapcodes on posters, or television shows and ads sending viewers to their social media accounts.

The Internet has changed how we see and engage with media. We can now collaborate, publish, share content and ideas much more easily than ever before, in real time and with people all over the world. All this online sharing and collaboration is facilitated by social media.

In social media's early days, chat rooms and social networks enabled individuals to 'meet-up' online to discuss topics, interact with one another and share their views and ideas. Today social media is so much more, as it plays a key role in the hyperconnected, Internet-dependent world we find ourselves in. It offers immediate content that is relevant to the user, when and where they need it. With social, the longer you take to post about an event or trend the less relevant that content becomes.

This inter-connectedness and real-time nature of social enables marketers to connect with their audience in ways they never could have dreamed of. Social media also provides new ways to address business challenges, such as awareness and conversion, and enables small and large businesses alike to grow their business and customer base.

To succeed in social media, you need to understand the basics, such as the various platforms available to you, which objectives social media can help you to achieve, and how to create a strategy using social media to achieve these objectives. This chapter will walk you through some of the larger platforms, and the following chapter on Social media strategy will demonstrate how to use social media strategically to achieve your marketing objectives.

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16.2: Key terms and concepts

Table 16.2.1

Term	Definition
Ads manager	An online dashboard provided by Facebook where one can view, edit, and access performance reports for campaigns, ad sets and individual ads. With Ads Manager you can view all your Facebook campaigns, track your payment history, make changes to your bids and budgets, export ad performance reports, and pause or restart your ads.
Avatar	A manifested online identity on social media and other online communities. An Avatar can be whatever the user chooses and is the personal image the user wants to project to other users.
Blog	Short for weblog. A type of website that allows users (bloggers) to post entries and self-published musings on different topics and which often allows readers to comment on these posts.
Boosted posts	A boosted post is a post such as status updates, photos, videos and offers, that will appear higher in news feeds so that more users will see the post. Posts can only be boosted from a brand or business page. Personal profiles cannot be boosted. The cost of a Boosted post depends on the number of users you want to reach.
Carousel ads	An ad form that allows the brand to show multiple images and/ or videos and a link to some action in a single ad. Up to 10 pieces of content can be included. Carousel ads have proven to be much more effective in driving traffic to advertisers' websites from social media platforms.
Chiclets	Social share buttons that appear as small icons adjacent to a blog post, image, article or web page which enable users to share the information via a social media platform, whose icon is indicated by the chiclet.
Cinemagraph	Online photographs, with elements that move, using looped video, published as an animated GIF, or other video format, to give the impression the viewer is watching an animation.
Content	Any items you post online are considered content. This includes status updates, images, posts, videos and any copy. Good content should engage users and build your brand.
Cover image	The main image on a social media page. It needs to catch the attention of the user, be consistent with your brand, and encourage the user to read more on the page and engage further with your brand.
Crowdsourcing	Taking a job traditionally performed by a professional and distributing it to an undefined, generally large, group of people in the form of an open call.
Crowdfunding	Funding a project or venture by raising financial contributions from a larger number of people. Kickstarter and Thundafund are examples of crowdfunding platforms that source funds for a variety of projects.
Facebook Business Manager	A service from Facebook that assists with managing access to multiple Pages and ad accounts. The service is ideal for businesses that need different permissions for different people in the organization.
Forum	A website where users can engage in discussions by commenting on threads or previous posts made.
GIF	Graphics Interchange format is a computer file in the form of a bitmap image that enables short lops of video to be transferred online easily in small file sizes.
Handle	A public username used to identify individual users online, usually on social media. For example, @RedAndYellowEd is the Twitter handle for Red & Yellow.
Hashtag #	A type of label or metadata tag. It is used on social media to label what content is about. It enables content to be searched and discovered more easily.
Hyperlink	A reference to data that users can find by clicking on a link, which will take them to the document or page to which it refers.
Keywords	Words identified as crucial search and advertising parameters. These words are used in copy or posts to optimise discovery and engagement.

Paid media	Any marketing efforts that involve a paid placement. PPC ads, branded content, display ads and promoted and boosted posts are all considered paid media. Paid media involves paying a third party to broadcast your message to others.
Power Editor	Another Facebook advertising tool. It is designed for larger advertisers that may have a large number of ads running simultaneously. The tool provides precise control over all the campaigns.
Social network	In the online sense, a type of website model where individual members become part of a broader virtual community, where they can share, communicate and collaborate in online commentary and engagement around a shared interest or goal.
Tagging	Using a keyword or phrase to group pieces of content together under a specific theme, or assigning a piece of content to another user.
Trend	To trend on social media means your content experiences a spike in popularity on a social media channel.
Viral	When a piece of content is shared in very large numbers it is considered to be viral. There is no exact number of shares that constitute viral. If the number of shares of a piece of content is exponentially larger than the usual number of shares of posts from that specific user, it can be considered to have gone viral.

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16.3: Marketing with social media

Social media has changed the world of marketing. Social media is all about the ways in which we create, connect, converse and share content online, and can be used as an integral part of an online marketing campaign.

To keep up with increasingly digital audiences, traditional media has had to adapt. This has changed the way content is published, both online and offline, as well as how advertising is sold.

For example, many newspapers now publish their content online as well as in their print publications. Online, they can get instant commentary on their articles, learn what their readers think and use this information to make editorial decisions.

News also comes from citizen journalists; ordinary people who post instant updates to social media about events unfolding around them. Often, news breaks via Twitter users rather than news outlets.

Social media has evolved significantly over the last ten years. Initially, social media was mainly earned media, but brands started to claim ownership of their pages, profiles and channels across the various social media platforms. More and more paid options have also arisen for brands to promote themselves on social media. With an ever-increasing number of players entering the social media space, brands need to spend more and more on promotion on social media for users to see and engage with their content. Social media is a mix of owned, paid and earned media options for marketing. Knowledge of how each of these forms is managed and planned is integral to developing and maintaining a brand.

Working with social media can be broken up into three phases:

1. Strategy
2. Implementation, which includes content creation and community engagement
3. Analytics.

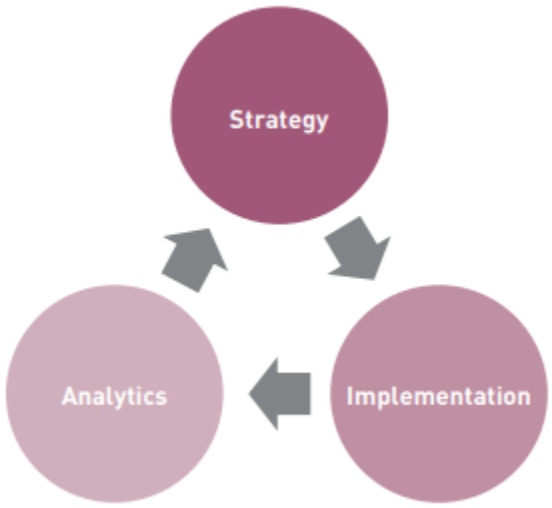


Figure 16.3.1: The three phases of working with social media

The process is cyclical, with the analytics of current content and engagement feeding back into the strategy. Depending on results, this alters the content created and shared, as well as how the brand engages with the community. These changes, in turn, are analysed and the cycle continues.

The next chapter, Social media strategy, addresses the strategic use of social media to achieve a variety of outcomes. This chapter focuses on the different social media platforms available to brands. It discusses the key features, marketing and advertising options, as well as how to access and interpret the analytics of the platform, and ultimately how to select an appropriate platform for your brand.

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16.4: Facebook



Figure 16.4.1: The Facebook logo *Adapted From Screenshot, Facebook, 2017*

Introduction and stats

Facebook has become the most dominant personal social network in the world. As of late June 2017, 2 billion users are now registered on the platform (that is nearly a third of the world's population), and more than 1.2 billion of them are active on Facebook daily. Because users are spending so much time on Facebook, advertisers and marketers want to capitalise on this audience.

> **Note**
>
> There are over 16 million Facebook users in South Africa (2Oceansvibe, 2017)

Facebook originally presented a means of forming and maintaining online social networks for communities of users who already shared real-world connections, interests and activities. But now, in the realm of social networking, it is unnecessary to have met someone in person to connect with them online. Social networks created new meaning for the term 'friend', with many connections existing solely online. Users can also choose to follow users' public posts without being Facebook friends with them.

Facebook has a number of ways for brands and organisations to use the platform to connect with potential customers. These include business pages, adverts, promoted posts, app promotions and now even direct online sales. Such marketing efforts are especially helpful to small businesses. Facebook enables content creation and distribution, and allows brands to engage with their customers in real-time twoway conversations through their 'page'. Facebook is a powerful platform for the implementation of a digital marketing strategy.

> **Note**
>
> Read more about advertising on Facebook and other social media channels in the chapter on Social media advertising.

Facebook has not only changed social media, it is changing how users access content on the Internet. Many users already receive most of their news and entertainment content through their News Feed on Facebook. Mark Zuckerberg intends to make Facebook the dominant channel through which users access content and online services. In 2014, Zuckerberg announced the plan to take on Google as a search engine and make Facebook the means through which users access the web (Edwards, 2014). It could be argued that Facebook is no longer a social media platform, but a media platform that offers a social community as one of its many facets.

Features

Pages

Personal profile pages remove much of the anonymity of the Internet. Users of social networks reveal a great deal of information about themselves, from basic demographics such as age, gender and location, to nuanced lists of likes and dislikes. By divulging this information to the network, they are sharing it with the networks' advertisers. For marketers, the accessible personal

information is like gold and can be used for targeted marketing. While only de-identified data can be accessed for marketing, users are often unaware of the data that is amassing on their online profile. For users, this can lead to privacy risks. Social networks do offer privacy management control options for users, but the default setting shares information. Different levels of information control must be activated in user settings.

> **Note**
>
> To see how much of your data is being shared publicly on Facebook, click on the three dots on the bottom right of your cover image and click 'View as' to view your profiles as an anonymous viewer. Are you surprised by what you see? Each post or share can have a tailored privacy level, either to friends, public or a custom audience.

For brands, a Page is the profile for a brand, organisation or celebrity. It looks very similar to a personal profile, and users can choose to connect with a brand on Facebook by liking its Page.

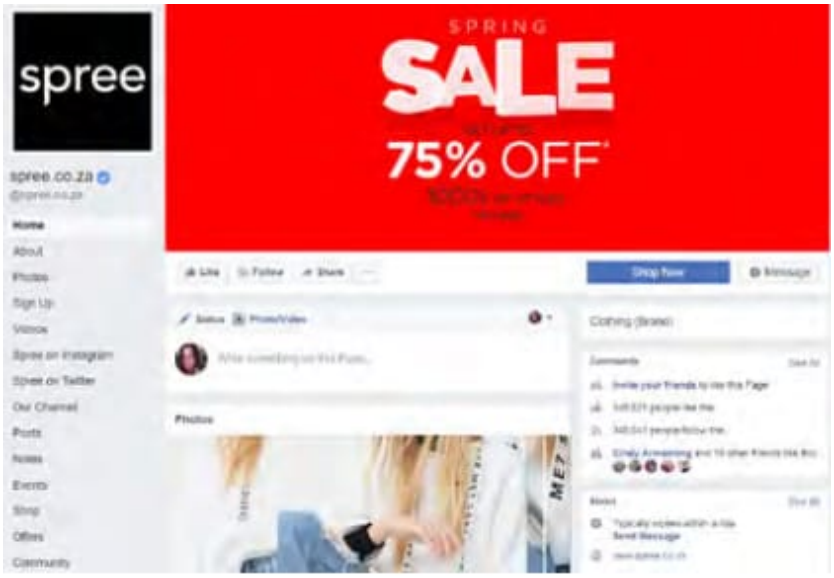


Figure 16.4.2: The Facebook Business Page for Spree *Adapted From Screenshot, Facebook, 2017*

Each Page consists of the following elements:

- A cover/header image, GIF or video (the large banner at the top)
- A profile image that represents the brand
- Buttons to like, share, comment or some other form of call to action
- The 'wall', where the brand's posts and interactions are displayed in a chronological timeline
- Tabs are distinct pages of information on the brand's Page. Tabs can be used to house richer, more graphic content, such as more detailed 'About' pages, photos, videos, services, shop and event news.

Users tend to expect that a credible business would have a Page on Facebook, and neglecting a well thought out presence on the network can lead to lost opportunities.

Reaction buttons



Figure 16.4.3: Reaction button icons *Adapted From Business insider, 2016*

The Facebook Reaction buttons allow users to share their feeling about a certain piece of content with their social circle. The

reactions include the original iconic ‘Like’ button, ‘Love’, ‘Haha’, ‘Wow’, ‘Sad’ and ‘Angry’.

The Like button can also be used on websites outside of the Facebook ecosystem, which allows visitors to recommend this site and content easily, and spot if their friends have liked the same content.

The use of the like button is sometimes tracked as a performance indicator for business Pages, to quantify the amount of reach and engagement for a piece of content. Liking content signifies that someone has actively interacted with it, while liking a brand Page does not prove continual or repeated engagement. For this reason the number of likes on a brand Page can be seen as a vanity metric.

Note

The heart, or Love button, as well as the Like button is used to gauge what content users enjoy the most on their newsfeed. The Facebook algorithm then ensures similar content is shown to the user.

Metrics can’t identify who actually read a post, but they can show how many users were reached, shown as impressions, through either paid or organic search. Impressions, shares or comments are much more reliable measures of reach and engagement.

News Feed

News Feed is the term used for the stream of content users see when they log on to Facebook. It’s a selection of recent posts and updates from friends, and brands with which they have connected on Facebook.

Facebook uses an algorithm to determine what information to show in each user’s news feed.

This algorithm is called the News Feed Algorithm. According to an official Facebook update, the following factors are considered by the algorithm before it displays content in a user’s news feed:

- **Who posted it?** – If you engage regularly with this person or brand, Facebook will show you more of their content.
- **Type of content** – Whether the content is a photo, article or video can carry different weight in the algorithm.
- **Interactions** – The number of likes, shares and comments.
- **Recency** - When the content was created or posted.

Stories are ordered, or shown at all, according to the relevancy score that is calculated from the factors listed above.

A user is more likely to interact with content that is displayed in their News Feed, so it is vital to ensure that your page content takes this algorithm into consideration.

There are five things publishers can do to optimise their potential for appearing in news feeds. These are:

- Use compelling headlines
- Avoid being overly promotional
- Try a range of media forms and monitor which is most appreciated by the audience
- Use publisher tools to provide Facebook with audience optimisation and audience restriction information (Facebook, 2016b)
- Use boosted posts or paid ads to gain exposure.

When users tag their friends or brand pages in their personal Facebook content, the post will appear on their page wall, and it will notify the friend and the brand page. If it is a public post, it could be shown to some of the brand page’s fans. This is also true for brands tagging other brands, which is encouraged to increase exposure.

Facebook Connect

Facebook users can conveniently login to services or websites other than Facebook with the same login details by using Facebook Connect. Users can grant permission for profile information to be shared between Facebook and the service they have logged in to. Users can also easily see who else in their social circle is using that service, and share information back to their social circle.

Facebook Video

Facebook Video allows for the upload of videos directly to Facebook. These videos play automatically and silently (unless clicked on) as users scroll through their newsfeeds. For brands, these videos have visible view counts, which in turn help more users discover them.

> **Note**
>
> Because the videos start playing automatically, the view counts on Facebook appear much higher than on other sites, and this means that more brands are starting to promote on Facebook Video rather than on YouTube.

To use Facebook Video effectively, and ensure high engagement and high rankings on news feeds, content creators should:

- Focus on quality from the first frame – lead with imagery and key messaging that will draw attention.
- Include text overlay if videos include voice overs – autoplay usually does not include sound, and the text overlay ensures the message is not going unheard.
- Premiere exclusive video content – show content that is only available to users on your page
- Provide context – pull out key quotes as the text component of your post, this helps draw attention and raises expectation of what is to come.

Facebook videos can have calls to action as a button at the end of the video itself or in the post. The video post copy can tag other pages as well (Facebook, 2016).

Facebook Live

Facebook Live allows people, public figures and brands to share live video with their followers and friends on Facebook. It is available to anyone with a page or profile on Facebook. Viewers can react and comment in real time on the video and brands can monitor how the broadcast is going. Facebook Live records the videos as well, which can then be viewed like any other Facebook video. The news feed algorithm has been tweaked to ensure that videos that are actually live are at that moment are more likely to be shown in a user's newsfeed (Facebook, 2017). It is a popular tool for brands and influencers and has proven very successful for brands like Starbucks, Kohls, and Sephora, as well as influencers like Martha Stewart. Mashable uses Facebook live to release a daily live show (Impact, 2017).

> **Note**
>
> You can find out more about how these brands have used Facebook Live at: www. impactbnd.com/blog/ facebook-live-businessexamples

Advertising and marketing with Facebook

Facebook, like many social networks, is free for its members, and relies on advertising for revenue. In turn, Facebook offers opportunities for brands to create a presence and use the existing social network to connect with and reach out to customers. Its search functionality has opened up dramatically and is becoming more advanced, which means it is providing more and more searchable keyword information for market researchers as well.

> **Note**
>
> People come to social networks to socialise and connect, not to see marketing messages; try to respect this by keeping your presence personal and valuable.

Because demographic and psychographic information is collected by the social network, advertisers are able to target their adverts to a very specific audience segment. Facebook ads that use 'conversion' objectives during set up, leveraging pixels to

track conversions, remarketing and call to action buttons such as ‘buy now’, amongst others, are the most effective and can be tracked to monitor your conversion rates.

> A conversion objective encourages users to take some form of action such as clicking through to your site, signing up for a newsletter, browsing your product catalogues, making purchases, and even driving users to visit your brick and mortar store.

Note

Refer to the chapter on Social media advertising for more information on targeting of your audience.



Figure 16.4.4: Tips for marketing on Facebook *Adapted From Infographics Archive, n.d.*

Brands can run promotions, offers and competitions through their Facebook Pages, but must ensure that they comply with Facebook’s terms and conditions. You can access offers at the top of your brand’s profile page.

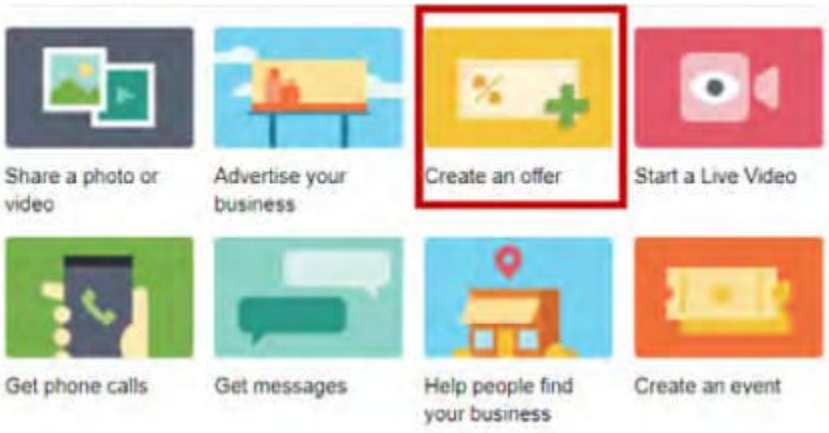


Figure 16.4.5: You can create an offer on your brand’s profile page by selecting the icon shown above *Adapted From Screenshot, Facebook, 2017*

Facebook campaign guidelines have become more relaxed and allow users to enter a competition through commenting on a post on Facebook, which does a great job of driving engagement.

Note

Read more about the Facebook competition regulations here: www.facebook.com/ page_guidelines.php

Facebook is now a pay to play space, where organic reach has dropped significantly, meaning brands now need to pay to have their content reach users' news feeds.

Selling on Facebook

Facebook is a great tool for education and awareness, which can convert to a sale over time, but up until 2016, this rarely happened through Facebook itself. Users had to click through to the online store via the Facebook page or search for the products on Google and find the online store. Facebook Store, introduced in 2016, enables brands to import their online store onto their Facebook page (www. facebook.com/store.tab), meaning users can shop and purchase without having to leave Facebook.

Facebook is not considered a hard sales platform and is predominantly used for gaining awareness and reach, recruiting leads, or channelling users into a database from which they can be targeted in future marketing, ultimately leading to a sales conversion. At the time of writing, purchases were rarely done directly from Facebook, without the user already being a warm lead, having previously seen a sales-driving advert.

Facebook Analytics

Analytics are the key to informing social media strategy, so monitoring your posts and marketing efforts is essential. Facebook Insights is available to business page administrators. It provides data on how users are interacting with your content and your page. This includes demographic information about the users connecting with your content (age, gender and location breakdown), which tabs and which content posts are seen and interacted with, and how many users hide your content from their news feed and when.

With the inclusion of Facebook Video, Facebook also created Video Insights, which provides metrics for video uploads. You can see unique views, duration, and audience retention, which help you to understand how your videos are performing. Video Insights helps you to refine and revise your video strategy.



Figure 16.4.6: An example of Video Insights for an individual video on Facebook *Adapted From Buffer Social, 2017*

Facebook summary

Because of its sheer size, 2 billion users and counting, Facebook is a popular marketing choice for many brands. It offers incredible reach and is particularly powerful for brand awareness. Other social media platforms seem to appeal predominantly to

younger markets, while Facebook has a broad appeal across age groups, making it a clear winner for brands who want to market to a more mature audience. The accessible analytics, helpful business tools, diverse ad options, and detailed assistance (through https://www.facebook.com/business) have all helped to make Facebook the number one social media choice for many marketers.

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16.5: YouTube

Figure 16.5.1: The YouTube logo *Adapted From Screenshot, YouTube, 2017*

Introduction and stats

Creating and sharing content for free is one of the hallmarks of social media, and YouTube is considered the largest of the content creation and sharing websites. The key word here is free: there are no fees for joining, whether you are uploading or viewing content, although premium paid-for membership such as YouTube Red can provide added features. This means that such sites attract an enormous audience. In fact, according to Alexa rankings, YouTube is the second largest website in the world, after Google! (Alexa, 2016). YouTube is now owned by Google and thus has the benefit of receiving prime results in the Google SERP.

YouTube encourages distribution of its content and allows videos to be embedded easily into other websites.



Figure 16.5.2: Sharing options on YouTube *Adapted From Screenshot, YouTube, 2017*

Online video consumption continues to grow year on year as bandwidth gets faster and cheaper. Sharing video content is easy with YouTube. Anyone can upload videos captured on simple devices such as webcams and mobile phones or on high-end professional cameras.

Some stats on YouTube:

- Over 1.3 billion active users
- Over 60% of users are male
- 50% of users are between 25 and 44 years old
- 300 hours of video are uploaded every minute
- Every day, hundreds of millions of hours are spent watching YouTube
- 3.25 billion hours of content are watched each month
- More than half of YouTube views come from mobile devices
- The number of hours spent watching YouTube is up 60% from 2016 (FortuneLords, 2017).

Features

YouTube is simple to use. Unregistered users can watch most of the publicly available videos. However, logging in with your Google account, or following the simple registration on YouTube, provides additional benefits. Registered users can upload an unlimited number of clips, comment on and add video responses to videos, and subscribe to content feeds that catch their attention and interest. Frequently enhanced functionality and clever features continually push YouTube to deliver bigger and better services to its ever-increasing user base.

YouTube allows individuals and businesses to own a channel on the site. They can brand and customise the channel as they like and manage the content that is created and shared. Viewers subscribe to various channels and get updates on new content. Vloggers, video bloggers, who create monthly, weekly or even daily posts, have become increasingly popular and some vloggers earn money and make a living through their YouTube programs.

Note

The most watched video in YouTube history is the music video for Despacito performed by Luisi Fonsi and featuring Daddy Yankee, which has netted over 3.3 billion views.

Marketing and advertising on YouTube There are two aspects to marketing through YouTube. The first is paid advertising by promoting video content next to, or during, other content on the site. The second is having a brand channel, which provides analytics and community features.

Marketing and advertising on YouTube

There are two aspects to marketing through YouTube. The first is paid advertising by promoting video content next to, or during, other content on the site. The second is having a brand channel, which provides analytics and community features.

YouTube has a host of advertising options. YouTube's Promote Your Video feature and YouTube Fan Finder are just two of the many ways the site can be leveraged for promotion. Adverts can also be managed through Google AdWords. See more about this in the Social media advertising and Video marketing chapters.

Having a brand channel is perfect for content marketing. Content shared on your brand channel should not be too promotional, but should offer value to your viewers. Some promotion is expected and accepted by viewers, but if you want to entertain viewers and encourage them to subscribe and continue to tune in to view your content, it is necessary that the content offer value.

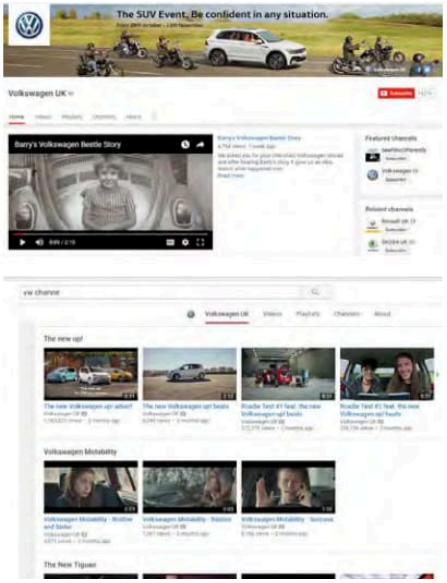


Figure 16.5.3: The VW brand channel on YouTube *Adapted From Screenshot, VW YouTube channel, 2017*

Note

Refer to the Video marketing chapter for more information on marketing on YouTube.

Using social platforms such as YouTube allows brands and video creators to tap into an existing community of avid video viewers. For example, YouTube has changed the way we view video commercials. Marketers have shown that if an advert is good enough, many users will choose to watch it. Super Bowl commercials, for example, are highly anticipated each year, and the best ones receive millions of online video views. These are users who have chosen to watch this advert at a media cost of zero! Other advertisers have realised that far longer adverts can be created and uploaded. As long as the content is good, users will watch, and hopefully share. Time constraints online are not the same as they are for television networks.

Online video sharing also makes it possible for conferences to generate a far greater audience than ever before. The companies

that run these conferences are able to engage with a massive audience by posting videos of the conference presentations, an excellent example of content marketing. TED (https://www.ted.com/) and Nokia, which runs Nokia World, are excellent examples of organisations that increase interest by making their remarkable presentations available for free.

YouTube's Community tab

YouTube has created the Community tab, which allows viewers to respond to a creator's posts. It allows users to reply to messages with text to react and share their thoughts. Brands can make posts consisting of text, image, polls, or video, and users can respond to these, making YouTube a far more social platform than before.

Read more about it here:

https://support.google.com/youtube/a..._topic=6059684

YouTube analytics

YouTube Analytics is available to all YouTube users for their videos and channels. Video views and popularity are broken up by geographical territory, as well as some demographic information. Discovery data shows how users got to your video.

One of the most useful reports for any video is audience attention. This report shows when users stop viewing a video, or rewind sections of video, and compares this to videos of a similar kind.

YouTube summary

YouTube offers brands and businesses a great platform to share content with their customers. Being able to personalise and brand your own YouTube channel helps to develop your brand's online presence and assists with SEO. Your own brand channel means having an online collection of all your video content that users can peruse in their own time. And through analytics, you can observe what types of content resonate more with your users. You can optimize your efforts by sharing popular content on other platforms or even paying for promotion of popular content to get further reach and awareness.

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16.6: Instagram



Figure 16.6.1: Instagram logo *Adapted From Instagram, 2017*

Introduction and stats

Instagram (instagram.com) is a mobile-based photo app that allows you to take a picture with your phone camera, and then add an interesting artistic filter to make it look polished and beautiful. This can then be shared on Instagram itself and on other social networks for followers to view and comment on.

People love to share photos, images, art and funny pictures online. Images tend to attract higher engagement than text-only posts.



Figure 16.6.2: Instagram sign in *Adapted From Screenshot, Instagram, 2017*

Some statistics on Instagram as of 2016:

- 700 million monthly users
- 400 million daily active users
- 32% of people online use Instagram
- Over 40 billion photos shared.
- 59% of internet users between 18 and 29 use Instagram, compared to only 33% of internet users aged between 30 and 49 years.

(Omnicore, 2017a)

Features

Users have a profile and a unique username. On their profile, users post images or videos. They can include hashtags and tag other users who may appear in the image or video or who they think the post would particularly appeal to and who might wish to engage with it. Instagram also provides for direct posts, which are posts sent directly to up to 15 specific users. This is a useful feature for businesses to engage with key influencers, who may in turn share the post with all their followers.

Note

Hashtags are key means of tracking relevant subjects, categories and trends. As on Twitter, hashtags help users find and give context to your post. For example, your post about a dog could have the hashtag #DogsOfInstagram or #dogstagram.

Users follow other users or brand pages that they find interesting. Posts can be liked, by double tapping the picture or tapping the heart icon, and commented on. Each user has an activity feed which provides the recent activity of the users they follow, as well as how people have engaged with what they have posted (Kirschner, 2015).

Instagram also offers Shopping on Instagram. Users will be able to tap on item to find a larger image, a description of the product and how much the product costs.

There will also be a link that takes users directly to the website where they can purchase that specific product. (Facebook, 2017b).

Note

You can watch a video on how shopping on Instagram works here: vimeo. com/209655799.

Marketing and advertising with Instagram

With over 400 million daily users, Instagram is one of the world's largest mobile social media platforms. Its benefit lies in boosting brand relevance through eyecatching visual content and potential large audiences. Business pages and posts cost nothing to set up, but like other social media platforms, Instagram is becoming a pay to play space. Brands need to use promoted posts to reach a more extensive audience than they would with simple organic reach. Brands can promote posts without a business page, but do not have access to analytics and data about their users and their engagement with posts and ads.

The large number of potential followers and the analytics data provided for business accounts provides marketers with key information about potential customers. To benefit from Instagram's analytics tool, Follower Insights, brands need a business profile, which can automatically be linked to their Facebook Page. Their contact information will be imported directly and any Instagram followers will be able to contact the brand through Instagram. Because Instagram is owned by Facebook, it integrates with Facebook's advertising interface, making posting across these channels seamless.

Note

Read more about this in the Social media advertising chapter.

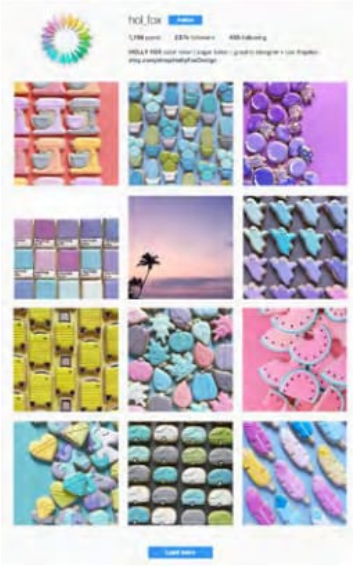


Figure 16.6.3: Holly Fox, a baker and graphic designer, uses beautiful and brand relevant imagery on her Instagram page, which has given her a strong and engaged following *Adapted From Screenshot, Instagram, 2017*

Brands need to ensure they connect with the right communities so that they reach the right followers, but also need to monitor competitors and their posts and followers. Brands should use hashtags in every post, preferably those that are popular and actually used by their audience. Hashtags enable tracking of mentions and shares and tends to make content discoverable. Rare hashtags can make content less easy for potential customers or users to find. But, only using popular hashtags means your content could get lost among a million other posts. A more unique hashtag, marketed and publicised well, can make your content easier to find. For example, #food renders millions of results, while #vegan will narrow these results. Hashtags are also good for SEO. Understanding your audience is crucial as a brand, and monitoring their engagement is necessary to ensure that your posts are relevant.

Note

For more details on marketing with Instagram, see https:// www.forbes.com/sites/ ajagrawal/2016/03/25/ the-101-of-marketing-oninstagram/#5e87f4be5db3

Business profiles can promote posts directly and can specify the business objective and call to action. Budgets and time periods for the promotion can also be tailored to the brand.

Note

For more information on the features of Instagram, see http:// sproutsocial.com/ insights/instagramfeatures

Instagram Analytics

If your Instagram account is tied to your Instagram, then you will have access to Instagram Insights. Instagram insights tracks followers and what they like. Information on posts such how many followers saw a specific post and how many engagements and views it received as well as total number of followers can all be tracked. Follower activity is also monitored, with insights into demographic details, competitor posts they have engaged with, time of day they are most likely to engage, and what trends your followers are following. Individual promoted posts can also be tracked.



Figure 16.6.4: Instagram Insights *Adapted From LinkedIn, 2016*

Marketers can use this information to improve their posts, increase engagement by planning a strategy that will ensure posts occur at optimal times, and include correct hashtags.

Instagram summary

Instagram is a great platform for brands that have a strong visual identity, or who are able to tap into this visual audience with beautiful and eye-catching content. Instagram can be managed through Facebook's Ad manager, meaning you can share content and manage ads and promotions seamlessly across both platforms from one place.

Instagram is constantly updating its features, integrating Snapchat like features, such as Stories and filters, and providing a pin board type feature for brands to collect and showcase their content and products. With the addition of Shopping on Instagram, there are new exciting eCommerce opportunities for retail based brands. Instagram is a popular mobile platform and should be considered by any brand that wishes to engage with a mobile, millennial audience.

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16.7: Pinterest

Figure 16.7.1: The Pinterest logo *Adapted From Screenshot, Pinterest, 2017*

Introduction and stats

Pinterest started in 2010. It is classified as a visual bookmarking site, where users can 'pin', categorise and share images and ideas they find online. Despite being pitched as a catalogue of ideas rather than a social networking platform, the site is considered one of the most popular social media websites with over 100 million active monthly users (Rouse and Wigmore, 2016).



Figure 16.7.2: Pinterest demographics *Adapted From Coschedule, 2016*

Features

Each pin is an idea. This could be a recipe, an image, an article, or a quote. Each pin links back to its original site. By including the Save button (or Pin It) button to your site, you make it easier for users to pin your content onto their boards in Pinterest.

Pinterest's main feature is the board. You create 'boards' on your profile by posting content or pinning content you find online. You can also repin content from other users' boards. Boards need to be designed and crafted around themes, and each board should be uniquely named. Users can follow a board or a profile. Boards are classified under subject categories, which help users find what they are interested in.

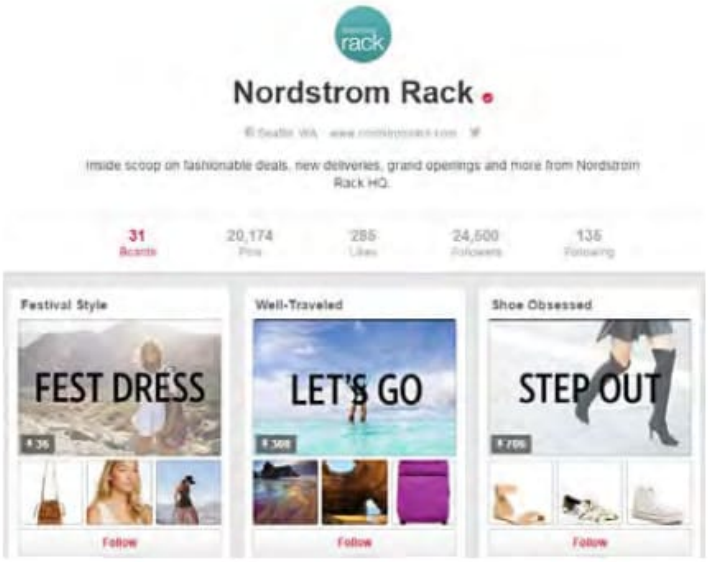


Figure 16.7.3: An example of a good Pinterest board *Adapted From Kissmetrics, n.d.*

You can now shop directly on Pinterest from a selected group of retail partners within the US. This will be extended to other retailers. Users browse pins as normal, and when viewing a buyable pin an “Add to bag” button will appear. The “Add to bag” button links back to the merchant’s store, enabling the user to purchase on Pinterest, with all necessary order details and payment information sent directly to the merchant for processing. To find out more about buying products on Pinterest, visit https://help.pinterest.com/en/articl...g-on-pinterest.

Marketing and advertising on Pinterest

As a business, you can create your own business page. This includes a host of tools, such as:

- Analytics
- Direct links back to your website
- Easier pinning of your website content via the save button
- Newsletters
- Buyable pins
- Options for promoting material

Even widget builders. Business profiles should not only be providing boards of their products. Boards should include the lifestyle or essence behind the brand. A makeup brand, for example, could also include boards on high fashion, new trends in makeup, interesting use of makeup in movies, and even general skin care.

Rich Pins allow businesses to add extra details to their Pins, such as the ability to:

- Directly install an app
- Include location and contact information
- Connect to articles
- Link to product information and purchase details
- Include recipes
- Show ratings and reviews for the latest movies.

Note

To see more about using Pinterest for marketing and advertising, see business.pinterest. com/en/tools and www. forbes.com/ sites/ ajagrawal/2016/03/15/ top-tips-forbeing-successfulon-pinterest-in2016/2/#3d8b49317df1 as well as the Social media advertising chapter

Promoted pins are pins that the business pays for to reach more people. They're native ad units that help users discover and save your ideas. Promoted pins work for awareness, engagement and directing traffic to your website. Pinterest has also introduced buyable pins, which allow users to buy your products directly through Pinterest.

Pinterest Analytics

Pinterest Analytics is the native analytics tool built into the site. It is available automatically to business account holders. It provides information on some important metrics, including:

- The most repinned items on your boards
- Various metrics about your audience, including their interests and the types of things they want to repin
- Impressions and viewers.

It gives information about what is working and not working on your boards, which can be adjusted accordingly. This should inform strategy and board design going forward (Pinterest, 2016).

Pinterest summary

The visual nature of Pinterest and the ability to use boards as collections make the platform a good choice for retail brands. Brands that target women are likely to do well on the platform due to its strong female demographic. Marketers who have used Pinterest comment on its higher than average conversion rate, with some attributing it to the fact that users of the platform are further along in the buying cycle. Pinterest is gaining in popularity as a social media space for marketing, and should not be written off when considering platforms.

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16.8: Other social media options

Blogging

A blog is a website where entries (blog posts) are typically displayed in reverse chronological order. Blogbasics (2017), defines a blog as a “frequently updated online personal journal or diary”. Blogs usually allow readers to comment on blog posts. A typical blog will feature text, images and links to other related blogs and websites.

Blogs for marketing can help you:

- Create an online identity
- Create a voice for yourself or your company
- Promote engagement with your audience
- Build a community.

Blogs can be very successful marketing tools. They’re an excellent way to communicate with staff, investors, industry members, journalists and prospective customers. Blogging also helps to foster a community around a brand, and provides an opportunity to garner immediate feedback on developments.

Corporate blog content should be:

- Industry relevant
- Appealing to your target market
- Transparent and honest
- Personal and entertaining
- Related to what’s going on in the blogosphere
- Posted regularly.

Search engines value regular, fresh content, and blogging can create just that. The more you post, the more often search engines will crawl your site looking for additional, relevant content. Basing your blog on the keyword strategy created during the SEO process can also ensure that your website ranks highly for key phrases. Blogs, by their social nature, can also increase the incoming links to your website.

Using a blog platform that is designed to be search engine-friendly is crucial to harnessing the SEO power of blogging. Some features of SEO-friendly blogging platforms:

- Each blog post should be assigned a unique page that can easily be accessed and indexed by the search engines (this is called a permalink).
- It should be possible to tag pages with keywords relevant to your SEO strategy.
- Each post should be able to have its own unique metadata (title, description and key phrases).
- Social sharing and bookmarking functionality should be built in.

Promoting your blog

> **Note**
>
> Cards Against Humanity used Medium in early 2017 to post about a ‘fake news’ press release after the Super Bowl. You can read more about this at: www. adweek.com/creativity/ why-did-cardsagainst-humanity-airor-not-air-a-horriblesuper-bowl-ad-abouta-potato/

List the blog in blog directories. While they’re not as popular as search engines, many Internet users visit them when looking for information. Examples include Blogarama (www.blogarama.com) and BlogCatalog (www.blogcatalog.com).

Blogs are powerful because of their reach, their archives and the trust that other consumers place in them. For a marketer, they

present opportunities to learn how others perceive your brand and to engage with the audience. Some brands get this right; some get it wrong. Blogs can provide a snapshot of audience sentiment regarding a brand. Marketers can also listen to blog activity around competitors to gain market insights.

Blogging platforms that can be used to set up a blog quickly and easily include:

- WordPress (www.wordpress.com)
- Tumblr (www.tumblr.com)
- Blogger (www.blogger.com)
- Medium (https://medium.com/)

Note

Tumblr is a part blogging, part microblogging tool and part social community. Each user has his or her own Tumblelog where they publish short text posts, images, quotes, links, video, audio and chats. Tumblr is perfect for users who don't need a full blog, and want to publish quick multimedia posts, usually from their mobile device. If you are interested in seeing how to use this platform see this article: How to use Tumblr www. lifewire.com/how-touse-tumblr-4049305

Podcasts

A podcast is a digital radio or video programme downloadable from the Internet. It is possible to subscribe to a podcast as one would to a blog. You can listen to a whole range of programmes and voices; just as blogs have allowed users to become writers without having to deal with a media channel controlled by someone else, podcasting has allowed anyone who fancies doing so to become a broadcaster. Many traditional radio shows are now also available in podcast format. Many liken the shift from traditional radio to podcasts to that of traditional TV channels to on demand online services, but at a much faster pace. Users see podcasts as the "Netflix for radio" (Main, 2016).

'Podcatching' software allows you to download the latest edition of any podcast you subscribe to automatically. Most people use iTunes, go to www.apple.com/ itunes/store for loads more information on podcasting and a huge list of available podcasts. You can listen on your computer or transfer the file to an iPod or MP3 player. Podcasts are usually free, and the most successful ones have very highquality content and production value.

Podcasts are usually recorded and edited using home equipment, and are done for the love of it. Specialised podcasting software is available, such as Apple's Garage Band or QuickTime Pro. These packages make it quite simple to record, mix and format the audio files correctly. Just like bloggers, though, many podcasters are trying to figure out ways of making money from their podcasts and turn listeners into revenue.

21% of Americans have listened to a podcast in the last month, which is the same number of Americans that use Twitter. In addition, 75% of podcast listeners take action on a sponsored message, which creates a huge potential audience for your marketing messages (Main, 2016). Podcasts thus offer an incredible opportunity for marketers. The bottom line is that you now have a way of getting content to your target markets without having to persuade a media channel to carry it or to pay huge advertising rates.

Podcasts are:

- **Targetable:** You can create highly relevant, niche content and then promote it to a specific target market.
- **Measurable:** You can see exactly how many downloads and subscribers you have.
- **Controllable:** It's your content.
- **Responsive:** Set up a blog alongside your podcast and alter content according to the comments; you are actually having a conversation with your market.
- **Boundary free:** It's the Internet.
- **Relatively inexpensive:** The equipment, software and skills are readily and cheaply available, and there are few or no distribution costs.

However, the content must be:

- **Excellent quality:** Like anything on the Internet, it is just as easy to unsubscribe as it is to subscribe. Quality content is what

keeps listeners coming back.
- **Real and valuable:** While there is value in having product or service information embedded in a website, there is no point at all in producing an audio version of a company brochure as a regular podcast. Even if editorial is not actually paid for, a lot of the time it has been influenced in some way by advertisers. Although there are podcasts that carry adverts, users can fast forward straight past them and the chance of real success lies in branded content.

This is not about advertising or even just product information. It is about coming up with ideas for real programmes that, through informing or entertaining, enhance your customers' experience of your brand. Refer to the chapter on Content marketing for more on creating non-promotional content that generates real value for customers.

It is also worth noting that brands do not need to make their own podcasts. A number of companies are advertising on other podcasts and doing well. In fact podcasts have become entry points for media consumers for plenty of brands. And with the audience growing rapidly, it is a strong channel that shouldn't be ignored (Main, 2016).

Bookmarking and aggregating

If there are websites you visit often, or that you would like to keep as a reference to come back to, it is easy to use your browser to 'bookmark' them. This means that you store the URL so that you can locate it again easily. It also gives you a personal library of websites that you can store on your computer.

Social bookmarking sites, however, allow you to store these links online, use tags to describe them, and share these lists with other users. Some of these sites allow you to submit URLs that other users vote on, while others allow you to use the tags saved to browse through the lists and libraries that have been generated.

Websites that encourage users to submit content to bookmarking and aggregating sites use chiclets. These are buttons placed around the content that make it easier to submit and share the article. These services allow you to see what the community of web users finds useful, interesting or humorous. You are able to find other users with similar interests to yours, and explore the websites that they have found that you might not have come across yet.

Content submitted to a social bookmarking or aggregating site can dramatically increase traffic to a website, and expose the site to many new views.

Seeing how users categorise your content will give you an idea of how your audience perceives your website and company. It may be remarkably different to how you think they see you. Look at other websites which are tagged similarly. You may find new competitors, and possibly new ideas. You can also use these services to share what URLs your company finds interesting. This can be a useful resource to add to an online press room, as well as a utility that fanatics of your company would get really excited about.

To generate links and traffic, investigate the sort of content for which your target audience loves voting, and create that content. A word of warning: never do the content submission and voting yourself. It's one sure-fire way to incur the wrath of these communities. Organic growth is the only way to go here. It may take time as you build your reputation and value among the community, but the end result can be very worthwhile.

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16.9: Analytics for social media

As with any digital marketing tactic, you need to be able to track and measure your campaigns to understand how successful they are and what you can do to improve them.

As we have shown, most platforms have native analytics, but because you do not actually host your presence, custom tracking is limited. Smaller businesses, in particular, rely on the built-in tracking offered by the various platforms, although new third-party tracking services are emerging and offering competitive and sophisticated tools, often for a fee. In some cases, it is also possible to integrate tracking to some extent if you are directing traffic to a web property that you own.

Web analytics software such as Google Analytics can also be used for social media tracking. On Facebook, tracking script can be inserted in applications and tabs where content is served through an iFrame. When sharing links to your own site and content, campaign tracking parameters can be used to track the source of visits and report on them in your web analytics tool. Here is an example of a url with a tracking tag.

is: www.redandyellow.co.za/5-way...er-women/?utm_source=newsletter&utm_medium=email&utm_campaign=AugNewsletter

The campaign tracking tag appended on the end of the URL is: ?utm_source=newsletter&utm_medium=email&utm_campaign=AugNewsletter

Click tracking with URL shorteners for social media

URL shorteners offer analytics that show how many users are clicking on links, when they are clicking, and where in the world they are. When you share links on services like Twitter, you should be tracking this data. When selecting a URL shortener, consider whether or not they keep the click analytics private. URL shortening services provide an easy way to share long links by generating a short URL that redirects to the original link. This is especially important when sharing links in messages with limited character counts.

There are several URL shortening services: bitly, goo.gl and ow.ly are three examples, and some websites have their own bespoke services, such as nyti.ms for The New York Times, which is excellent for reinforcing brand recognition. Twitter also has their own bespoke service, and no longer requires you to use one of the URL shortening service. Twitter will automatically alter the length of any URL provided in the tweet to 23 characters.

Using URL shorteners is very effective. For example, we may want to tweet a link to Red & Yellow's online Digital marketing course. The URL to a post may be

https://www.redandyellow.co.za/cours...keting-course/

That's 64 characters!

Using bitly, a URL shortening service, the link becomes http://bit.ly/1jpqs4e. It's now just 21 characters long, and can be tracked.

Even better, some link shorteners allow you to customise your link, so the result could be bit.ly/R&YCourse, which is much easier to read and share.

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16.10: Selecting the appropriate platform

When choosing the most appropriate platform for your brand or business, you need to look at three key questions.

Who is your audience?

You need to define your target audience as much as possible, and research them well. Find out as much about them as possible. Include their digital habits and typical online behaviours in your research.

How can you reach them?

Once you know who your target audience is, you can analyse the demographics and psychographics of the typical users of the different platforms and choose the platform your target audience uses and spends the most time on.

Facebook and YouTube are popular choices because of their large user base and thus potential reach. However, more niche platforms such as Pinterest or LinkedIn may be better choices as your content will appeal to and resonate more to these refined target audiences possibly resulting in more engagement than on one of the larger platforms.

What are your goals?

Certain platforms lend themselves to certain business and marketing goals. Do you just want awareness? Or do you want to build relationships and establish yourself as an industry expert? Are you looking for hard sales and traffic? Each platform will meet different objectives, and it is important to choose one that is most appropriate to what you want to achieve.



Figure 16.10.1: Choosing the right social media platform *Adapted From ThursdayNTinM, n.d.*

As discussed earlier in the chapter, marketing on social media is no longer without costs. As more and more players enter the market, getting your content seen and noticed requires promoted posts, paid-for ads and targeted marketing. Even if having a channel, page or profile on a platform is free, creating content, especially videos, to put on the platform, costs money. It is important that the channel you post your content on provides the necessary return on investment.

With its large userbase and sophisticated targeting options Facebook provides the largest return on investment for most brands. With over 95% of brands sampled declaring a return from the platform. Snapchat with its expensive ads, smaller userbase, and limited ad control makes it a less attractive option. Only 2% of brands sampled declared any type of return on investment from Snapchat. These means that most marketers are putting their money on Facebook to see a return on their investment (Socialfresh, 2016).

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16.11: Rules of engagement

Social media implies a democratisation of information, and requires authenticity and openness from those who deliberately use it for marketing. This means that good and bad stories spread easily and stay accessible. Jeff Jarvis had problems with Dell way back in 2005, and you can easily find all the relevant information about his ordeal with a quick Google search for 'Dell hell'.

Although you engage publicly with a wide audience when marketing online, marketers need to remember that they are communicating with individuals. While marketers should engage in the conversation, and ideally lead it, they cannot control it.

Marketing to content creators

Content creators can have strong followings on social media and are thus regarded as online influencers.

Online influencers hold a lot of sway, and should form part of any social media strategy. Supply such content creators with the tools and resources they need to talk easily about your product, including links to your social profiles, Twitter handles and hashtags.

Marketing to content consumers

Social media allow anyone to have a say, and the same tools that are available to individuals are available to companies. Company blogs allow a brand to build an online personality and to interact with their target market. Entertainment created and spread via social media increases brand touchpoints. Using the same channels that are available to your consumer aids in understanding the consumer, and levels the plane of conversation.

When using social media to reach out to content consumers, go to where your consumers are. The media you use is dictated by your users. For example, a nightclub for students can create a Facebook Page to advertise its weekly specials and interact with fans, while Land Rover enthusiasts may prefer to engage on a discussion forum.

With all interactions, marketing messages need to be clearly identified and labelled, with a disclaimer added if necessary. Trying to hide them as something else will only decrease your authenticity and probably your following.

Marketing to content sharers

Content sharers are content consumers who also pass your message on, whether it's by chat or email, by sharing a link on a blog or by submitting your content to a bookmarking or aggregating service. They are a crucial link in the chain that passes your message around. Make it as easy as possible to share your content by using chiclets and unique and easy-to-read URLs.

Advertise on social media platforms

While marketers can use the tools of social media to convey their message, the characteristics that define a social media platform are also important. Social media allows users to express themselves, and this means that rich demographic and psychographic information can be compiled for more useful and targeted advertising. This presents many opportunities for finding creative ways to reach an advert-fatigued demographic. It also introduces the risk of dealing with personal information so make sure you're up to speed with the relevant laws in your country.

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16.12: Advantages and challenges

People are finding it easier to switch off or ignore traditional advertising, particularly through traditional media channels such as TV or radio. Social media gives brands the opportunity to interact with customers through relevant and targeted communications that customers can choose to engage with on their terms. For example, a consumer may visit a branded YouTube channel as opposed to deliberately ignoring advert breaks on television.

Social media's potential shareability can be one of its greatest benefits; if users like your content enough, they may share it with their own communities. This is increasingly rare and difficult to engineer.

Social media allows you to engage with an online community and connect your brand to the appropriate audience. Together these create an online community for your brand and its supporters. Social media has created a forum for brand evangelists.

The numerous interactions on social, allow you to garner feedback from your communities. Such feedback helps drive future business insights and innovation, as well as marketing strategies. You can learn more about your audience's likes, dislikes, behaviours and needs.

However, companies need also be aware that bad messages spread as quickly as good ones. The connectedness that can prove so useful can also be a conduit for negative messages and brand attacks. Social media facilitates a two-way conversation between customer and company. This necessitates that the company shifts approach from 'deploy and watch' to one of constant involvement with the audience.

This new landscape is one in which the customer really is king, and any attempt to dethrone the king can have dire consequences. Efforts to control the conversation in social media are soon found out, and can backfire horribly. Any company embarking on a social media strategy needs to be sure to monitor their reputation online regularly. It is crucial to know what is being said about your brand online, and to respond timeously when communicating in the social media sphere.

Finally, never forget that special rules and laws apply when you are dealing with personal information provided by users so be very careful how and where you use this data.

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16.13: Case Study - Harley-Davidson

One-line summary

Harley-Davidson Australia used Instagram to successfully reach a younger audience in the 18–35 year old millennial market.

The challenge

Harley-Davidson is an iconic American motorcycle brand. The brand has come to symbolise freedom and individuality, but is associated with an older market. The brand wanted to raise brand awareness and engage a younger audience.

The solution

Harley Davidson decided to use Instagram ads, for the first time, to reach 18–to 35-year old men in Australia and New Zealand.

Harley-Davidson used a series of illustrations to fit in with the visual nature of Instagram. They wanted to appeal to young, adventurous people who appreciate the world through a more visual lens. The brand identified three themes they felt resonated with their intended audience, and tapped in to their own artistic heritage of seeing motorcycles as pieces of art. The brand commissioned local Australian artists to interpret these themes.

The illustrations were displayed as carousel ads for each theme. When swiped the images connected to form a storyline. The visual style was designed to mimic tattoo-like images and motifs that are popular in biking culture.



Figure 16.13.1: An example of the 2016 Harley-Davidson posts on Instagram *Adapted From Digital Training Academy, 2016*

The results

Over a run of just over two weeks, the ads reached almost 1.4 million men, aged between 18 and 35.

The ad drove over 8 000 clicks through to the brand's website.

Harley-Davidson achieved their objective of resonating with a younger audience, and ultimately expanding their demographic (Digital Training Academy, 2016).

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16.14: The bigger picture

A strong digital marketing strategy draws successfully on various tactics, leveraging these together. Social media can complement tactics as follows:

Social media is inextricably linked to content marketing strategy. Content is the foundation of any social media marketing endeavour, whether you're creating digital copy, images, videos or other media.

Social media can have SEO benefits. By using social media services, either to create or share content, websites can attract links and generate engagement, helping to enhance search engine rankings. Signing up to several social media channels can help a company own a larger chunk of the search engine results page. Companies can also use their SEO keyword strategy to focus their social media efforts.

Social media can provide a targeted network for online advertising. Detailed demographic information can play a large role in media planning and buying. Advertisers should create targeted interactive advertising for these mediums to encourage engagement. Social media also provides affiliates with new avenues for targeted traffic, resulting in revenue growth for the company being marketed this way. Social media plays a large role in online monitoring and reputation management, viral marketing and digital PR. Social media is used to express opinion, and so is the bedrock of online reputation. Any company that wants to communicate to this connected audience needs to listen to social media. Social media is also key to finding and accessing your biggest brand advocates and influencers, who can be powerful allies in building your reputation.

All other marketing efforts should feed into building your online community. Chiclets and referrals to your social media pages should be included in all other marketing materials. Social media should in turn try to convince users to sign up for newsletters or loyalty programs to get users to join your brand owned CRM. If the user is simply following you on the platform, their customer data lies on the third-party platform. Having their data in your own CRM allows you deeper access to that data so that you can engage with your customers through other mediums such as email and mobile.

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16.16: Twitter



Figure 16.16.1: Twitter logo *Adapted From Screenshot, Twitter, 2017*

Introduction and stats

Twitter is the most popular microblogging service. Microblogging is a form of blogging that allows a user to publish short text updates, usually limited to 140 characters, which can be viewed by anyone or restricted to a specific community. Twitter (www.twitter.com) was launched in July 2006. These 140-characters posts, called tweets, are usually short thoughts or links to interesting articles.

> **Note**
>
> Twitter trialled using 280 characters in 2017. You can find out more here: www.nytimes. com/2017/09/26/ technology/ twitter280-characters.html

Twitter boasts over 328 million monthly active users, with 100 million of those active daily sharing over 500 million tweets every day. Twitter was thought to be a platform for older users, but latest stats show that nearly 40% of users are between 18 and 29 years old, compared to around 30% of users being between 30 and 49 years old. Twitter is definitely a platform that users access on the go, with over 80% of Twitter users accessing the site from their mobile phone (Omnicore, 2017b)

Features

Each user on Twitter will have a unique username denoted with @ and their chosen name, for example, @robstokes for www.twitter.com/robstokes. Tweets can be directed to a specific user simply by typing their @username at the start of the tweet. This is also known as their twitter handle.

> **Note**
>
> The hashtag was first used in 2007, and used so that users could track the online communications and discussions about a specific event, Barcamp. The #barcamp is thus the first use of the hashtag in social media.

Like Instagram, Twitter users use hashtags to categorise their posts by adding a word or phrase prefaced with the # symbol for example, #DigitalMarketing. The hashtag will become a link that you can click to see other tweets that share this tag. Users can also choose to follow a hashtag, meaning that they will see all public messages with that tag, whether they follow the user who posted it or not. This can be a very useful way of collating information at events such as conferences. If you're not at the event, you can still follow messages from the event by following the hashtag. For those at the event, all tagged messages can be broadcast in a shared location.

If a hashtag or keyword is used very frequently in a short time, it can become a trending topic and is displayed to the left of a user's tweet stream. Events of global interest usually feature heavily, but sometimes brands can trend too (although not always for the right reasons). If a tweet is considered noteworthy, it can be retweeted or quote retweeted. Retweeting means reposting somebody else's tweet to your own profile, along with their username. Twitter automatically displays this as a retweet. A quote retweet allows you to retweet another post, and include a comment about the tweet as well.



Figure 16.16.2: An example of the new 'quote tweet' feature on Twitter that allows you to include a comment about the post you are retweeting *Adapted From iPhone in Canada, 2015*

Marketing and advertising with Twitter

Twitter has become a popular and important marketing tool for many organisations, brands and individuals. Many brands use it successfully for rapid customer service, for example, @jetblue @klm and @dstvcare.

Twitter has become a great market research and consumer insights tool. The ability to search for brand keywords on Twitter and track indirect conversations, offers huge insight to brands.

Its immediacy allows for news to be broadcast to dedicated followers and fans first, as pop star Lady Gaga has done with single releases (@ladygaga). Dell lists several Twitter channels (www.dell.com/twitter), many of which exclusively release offer information (@delloutlet).

Twitter has a series of self-service advertising options, which are covered in detail in the chapter on Online advertising. These include Promoted Tweets, Promoted Accounts and Promoted Trends.

Twitter Analytics

Currently, Twitter Analytics is available to everyone that uses the Twitter API to provide analysis. Hootsuite's Twitter management tools have built in analytics (https://hootsuite.com/)that can provide insightful data. Important metrics for Twitter include how many users interact with your content by clicking through on links, how many reply to you, how many retweets you receive, as well as hashtags and trends.

Twitter summary

Twitter remains a powerful platform for brands. It facilitates two-way communication with users, and provides great reach and awareness through possible retweets. The analytics are good, and the hashtags enable great tracking of sentiment about your brand, products and events. The increasing number of ad options is also a great plus for marketers.

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16.17: Snapchat



Figure 16.17.1: The Snapchat logo *Adapted From Seek Logo, 2017*

Introduction and stats

Snapchat was launched in 2011. It is a mobile messaging service that sends photos, videos, texts and drawings, but the message only lasts for ten seconds and then disappears. Snapchat is free to download and free to send messages.

Snapchat has proven extremely popular with teenage audiences, who seem to enjoy the ephemeral nature of the app. 71% of Snapchat users are under 25, though this is changing rapidly, and 28% of US teens consider it the most important social network. Around 35% of users admitted to using the app because the content disappears.

In 2017, there were 166 million daily active users, with 60% contributing content daily. Over 9 000 snaps are shared per second, averaging out to 400 million a day, and the platform receives 10 billion daily video views. The average user spends 30 minutes a day on the app.

Snapchat has seen exponential revenue growth. In 2014 its revenue was US $3 million; this grew to US $50 million in 2015, US $404 million in 2016 and a whopping projected US $1 billion for 2017 (Techcrunch, 2017).

Features

Users have a profile and use the app to share Snaps. A Snap is an image that the user can modify with filters or the drawing tool. A filter can denote the outside temperature, your speed, time, location and more. The Draw tool allows users to draw over the photo or video, with a full colour spectrum, and Type allows them to annotate and add personalized text. Users can also add Geofilters and sponsored lenses to the photos, both of which have proven strong marketing tactics for brands.



Figure 16.17.2: Cadbury Sponsored Lenses on Snapchat *Adapted From Shane O'leary, 2016*

Another popular Snapchat feature is Snapchat stories. These stories are groups of images or videos, put together as a kind of mini-movie, that is available for a user's followers to view for 24 hours (Webwise, 2016).

Marketing and advertising on Snapchat

Snapchat can be used for sharing various content with your audience. This can either be value added content, in the form of how to's, latest industry material, and relevant tips; or it can be storytelling content, taking your audience behind the scenes of your business or showcasing aspects of your company culture and values and providing a glimpse into the brand. Geofilters and sponsored lenses are also great ways to get your audience to engage with the brand on the platform. Brands pay a daily rate, sometimes as much as US $750 000 a day, to provide branded filters and lenses for users to play with and share.

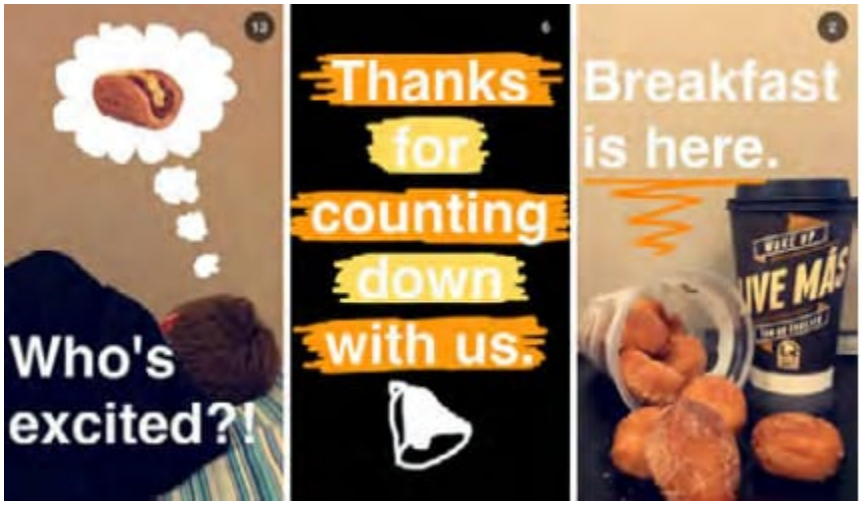


Figure 16.17.3: Taco Bell using Snapchat for the launch for its new breakfast offering *Adapted From Usabilla, 2016*

Snapchat Analytics

Just like any other platform, it is necessary to monitor your performance on Snapchat and to continuously improve and optimise your content to drive a larger audience. Snapchat analytics provides information on the number of total story completions, unique views and screenshots. Seeing which type of content your users prefer means you can really optimise your efforts.

Snapchat Summary

Snapchat is proving to be a powerful marketing tool, albeit an expensive one. Paid marketing efforts on the platform are mostly limited to big brands that can afford the high rates and the development costs to create engaging and interactive filters. However, smaller independent brands can still make good use of the platform to share behind the scenes information, build up to events, and build a loyal following, especially if your target market is more youth orientated.

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16.18: LinkedIn



Figure 16.18.1: The LinkedIn logo *Adapted From LinkedIn, 2017*

Introduction and stats

LinkedIn is a professional social network. It has 433 million members in 200 countries around the world. More importantly, one in three professionals in the world has a LinkedIn account, and almost 50% of key decision makers use LinkedIn for business purposes. LinkedIn is also 277% more effective for lead generation than Facebook or Twitter (PerfectBoom, 2016). To access all the benefits of LinkedIn, you need to have a company presence. LinkedIn is used for building networks, improving credibility, and driving recruitment. LinkedIn can:

- Help your business to engage and connect with influential industry figures
- Boost search engine page rank
- Provide a host of data for market research
- Allow businesses to monitor prospects and customers
- Enable businesses to clarify what they stand for
- Track and learn more about the media covering your industry
- Assist in positioning your business as an industry thought leader
- Engage customers with LinkedIn hosted content.

(Karr, D. 2015)

Features

Company page

A company page helps LinkedIn members learn about your business, your brand, and any job opportunities in your company. A company page is a great starting point for developing a reputation as a leader or player in your industry.

Initially, company pages were viewed as HR landing pages, but they have evolved. They can help drive business results, increase awareness about your business and its products and services, and promote career opportunities. Your LinkedIn company page should be viewed as a supplement to your company website and should help to drive traffic to your website. These pages provide free marketing opportunities and can enhance the credibility of your company. Good copy on your page should incorporate your key phrases and key words to ensure your site is optimised for search engines.

Some key tips for a great company page include:

1. Highlight your business entities with a showcase page
2. Share engaging content regularly
3. Optimise for search engines using keywords
4. Target prospective candidates with a Careers tab
5. Use an eye-catching cover image to grab user attention (Edgecomb, 2016).



Figure 16.18.2: The Four Season Hotel's company page on LinkedIn uses a great image, and focuses on their achievements and their people rather than pushing the hotel. *Adapted From Impact, 2016*

Note

For more information on creating a quality company page see the following link: https:// www.forbes.com/sites/ williamarruda/ 2016/07/21/ how-to-create-acompelling-companypage-on-linkedin

Showcase pages

LinkedIn also has Showcase pages, which provide a way for companies to highlight their individual brands, specific products, or new initiatives. Showcase pages are an extension of Company pages. A dedicated page helps drive engagement, and allows businesses to share specific content with a targeted audience. LinkedIn users can now follow only the aspects of your business they are interested in. Showcase pages are designed to build relationships with relevant LinkedIn members, and LinkedIn suggests using Sponsored Content and Sponsored InMail for more campaign-based marketing efforts.

LinkedIn Groups

LinkedIn Groups allows for your company to join with other professionals and businesses outside of your immediate circle of contacts. It broadens exposure and connects your business with others in your industry. It provides a platform for you to share industry expertise and establish your business as a thought leader. Participating in Group discussions also potentially attracts visitors to your company page.

Groups help extend the reach of your content and provide constructive feedback from relevant professionals. Groups share information about target audiences and provide market researchers with insights. It is important to join Groups that are relevant to your business and interests. Sharing company content on a Group increases traffic to your page and your website. To avoid being seen as overly promotional in Groups and only pushing your own agenda, engage in a courteous manner and share, comment and use the opportunity to create meaningful relationships.

Job postings

LinkedIn is often the first place top talent look for work, so it's important that your job vacancies are displayed and kept updated. It is also useful for HR to recruit new talent by looking at potential candidates using LinkedIn and asking them to apply for specific positions.

Advanced People search

The Advanced People search enables your business to network by seeing who your contacts know, and in turn connect with them directly. The power of LinkedIn lies in its ability to make new connections and relationships through existing ones, and using such opportunities to expand the business. Current stats say that 50% of B2B buyers use LinkedIn as a resource to inform purchasing decisions, while 76% of B2B buyers use recommendations from their professional networks for whom they wish to work with (Newberry, 2016).

LinkedIn Pulse

LinkedIn Pulse is a blog platform. Brands are not able to use it themselves, but by working with influencers, the platform can be leveraged for marketing.

Marketing and advertising on LinkedIn

LinkedIn is a great marketing tool in terms of generating awareness, understanding your target audience, making connections and building relationships. It also offers a range of advertising solutions. These include:

> **Note**
>
> For more information on advertising on LinkedIn see https:// business.linkedin.com/ marketing-solutions/ how-to-advertise-onlinkedin and the Social media advertising chapter.

- Sponsored content – boosting your content
- Sponsored InMail – deliver relevant content directly to your potential customer's LinkedIn mail boxes
- Text Ads – self-service advertising platform offering high quality leads within tight budgets. (LinkedIn, 2016)

LinkedIn Analytics

LinkedIn has its own native analytics service which provides a good amount of information on audience and engagement. It provides useful data on updates, reach and engagement.

'Updates' is a table showing the most recent updates, including:

- Previews of posts
- The date posted
- The audience the post was sent to
- Whether the content was sponsored or not
- The number of impressions to LinkedIn members
- The number of clicks your content received
- The number of interactions (likes, comments or shares)
- Any additional followers who were acquired due to the post
- Total engagement.

Additional graphs showing the reach of the post include the trend on the number of times updates were seen organically and through paid channels. Engagement is also illustrated on a graph to demonstrate engagement across organic and sponsored campaigns for various time lines (White, 2016b).

Other companies, like Quintly (www.quintly.com/linkedin-analytics) and simply measured (simplymeasured.com/linkedin-analytics) also offer detailed analysis of LinkedIn pages and their performance for your business.

LinkedIn Summary

For B2B marketing, LinkedIn is definitely the platform of choice. The unique targeting and search functionalities of the platform

make it well suited to such marketing efforts. It also provides a lot of unique options for B2C marketers, and can be leveraged nicely for professional contacts and to gain acclaim within your industry.

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16.E: Social media platforms(Exercises)

Case study questions

1. Why was Instagram an appropriate choice for Harley-Davidson?
2. Why do you think the brand decided on illustrations?
3. What other platforms would you have considered and why?
4. Are the themes the brand chose relevant to their target audience? Motivate your answer.

Chapter questions

1. Visit www.guardian.co.uk. List the ways in which this print publication is embracing social media.
2. Why is transparency so important to marketing using social media? Has this halted or accelerated the use of social media for marketing?
3. What is the difference between advertising using social media and marketing using social media? What are the benefits of social media to each, and what are the challenges?

Further reading

www.mashable.com – a blog that covers social networking and social media.

http://www.socialmediaexaminer.com/ – an online magazine that publishes original research oversees multiple communities for social media marketers.

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16.S: Social media platforms(Summary)

Social media refers to the creation and sharing of content by consumers on the Internet. It gives all Internet users, including brands and organisations, the opportunity to become both creators and consumers of content.

Social media refers to a collection of sites and platforms that include the following activities:

- Creating and engaging in social networks
- Creating and sharing content
- Using other Internet users' preferences to find content.

Most social media services are free to all users and rely on advertising for revenue. Social media provides targeted demographic information to advertisers looking to direct their advertising.

In this chapter we have discussed some of the main platforms, but there are many other smaller niche platforms, such as Tumblr, Vine, Spotify and SlideShare.

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17: RETAIN - SOCIAL MEDIA STRATEGY

Learning Objectives

In this chapter, you will learn:

- The strategic uses of social media.
- The steps involved in creating a social media strategy.
- To design documents and protocols you should have in place for social media success.

17.1: Introduction

17.2: Key terms and concepts

17.3: Using social media to solve business challenges

17.4: Step-by-step guide to creating a social media strategy

17.5: Documents and processes

17.6: Dealing with opportunities and threats

17.7: References

17.8: Step-by-step guide for recovering from an online brand attack

17.9: Social media strategy risks and challenges

17.10: Case study - Fjordland's 2015 Christmas campaign

17.E: Social media strategy

17.S: Social media strategy

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17.1: Introduction

In the previous chapter we covered some of the major social media channels and platforms, and the three phases involved in using them to reach your customers. These included strategy, implementation, and analytics. Strategy is by far the most important, as it informs what and how often you post, and how you choose to engage and relate to your audience. Strategy also informs how and what you will analyse. It is important that all these parameters are clearly established in your strategy, and that your strategy is in turn informed by the analytics you receive on your content and style of engagement.

Social media can be used to solve business, marketing and communication challenges, and is an important part of digital marketing. With so many platforms and choices available in social media, this chapter will show you how to use these spaces strategically to address these challenges. The last few years have seen a shift in social media strategy. The space is becoming a more traditional medium for advertising, but with a far better ability to target consumers. While it is still recommended to build a community on Facebook, there are brands using the platform for effective advertising, without actually having any followers.

Despite these changes, effective community and reputation management should remain key considerations in your social media strategy. Planning and thinking strategically, while leaving room to be flexible and respond to analytics and tactical opportunities is your key to making the most of social media marketing.

Consumers spend more and more time online, and that time is increasingly being spent on social media sites. In 2016 over 67% of Internet users were active social media users, equating to 2.3 billion people, 10% more than in January 2015 (Chaffey, 2016). Users spend an average of 30% of their time online, on social media (Mander, 2016).

The largest demographic of social media users is still young adults, aged 18 to 29, but the largest growing demographic is the over 65 year olds, who have tripled in number since 2010. Mobile is the device of choice when accessing social media, eclipsing desktop. In fact, 80% of Facebook's audience access the platform via mobile (PewResearchCenter, 2015).

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17.2: Key terms and concepts

Table 17.2.1

Term	Definition
Community guidelines	The rules and principles that community members must adhere to when communicating on a social media platform.
Community management	Community management is the building and monitoring of online communities generated from your brand's blogs, forums, social network pages, etc.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Lead	A person who has shown interest in a brand, product or service and could be converted into a customer.
Objective	A desired outcome of a digital marketing campaign.
Online reputation management (ORM)	Understanding and influencing the perception of an entity online.
Search engine optimisation (SEO)	The process of improving website rankings in search engines.
Social media dashboard	A service that allows you to centralise management of your social media properties.
Social network	In an online context, a type of website model where individual members become part of a broader virtual community
URL Shortener	A web tool that creates a shorter version of a full URL.

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17.3: Using social media to solve business challenges

Strategy is an important aspect of social media planning. Part of that strategy is identifying which business challenges, marketing and communication challenges in particular, your social media will address. These can include:

- Communication and outreach
- Community management
- Support and customer service

> **Note**
>
> Not all businesses face all of these challenges. Which ones are relevant to your brand?

- Reputation management
- Advertising and awareness
- Sales and lead generation
- Search engine optimisation
- Insights and research.



Figure 17.3.1: Social media marketing can help with a number of business challenges

Communication and outreach

Social media offers brands an effective two-way communication and real-time broadcast channels. This bi-directional communication is what makes social communities so exciting (and challenging). Just as consumers can communicate with each other, and send messages to businesses and brands, so businesses and brands can use this medium to communicate with and reach out to the public. Social media is a highly effective public communications tool.

Businesses, governments, and other organisations use Twitter and Facebook to broadcast timely messages, allowing interested parties to keep informed in real time. This has become a vital aspect of newsworthy and breaking news events such as elections, disasters, and global sports. Many organisations also use social media tools to broadcast service updates.

Note

Ideally, you want to be the trusted go-tosource of information about your industry

Community management

Social media platforms are built around communities, and are sometimes virtual representations of real-world networks and communities. This feature of social media can be used to build and maintain a supportive community around your organisation.

Community manager' is a role that has risen to prominence as more organisations start using social media, but it has always been an important role in any community, from groups that thrive on forums, to communities run on Facebook.

Creating, building and nurturing a community means that organisations don't just participate in conversations that are happening around and about them, but also actively lead and guide those conversations. These communities are generally made up of the organisation's biggest fans, often called brand evangelists, who feel as if they have a big stake in that organisation. This creates an environment where those fans can interact directly with the organisation, and where the organisation can send messages directly to those fans and solicit their feedback. See some great tips on successful social media management at: http://www.toprankblog.com/2016/10/7- helpful-hacks-successful-social-media-community-management/



Figure 17.3.2: Example of good community management: Chipotle providing awareness of their product and then responding to customers in a brand appropriate tone and encouraging engagement and sharing of the post *Adapted From Digiday, 2015*

Building and maintaining a community is a long-term project. It starts with determining what the best platform is for that community; something that already exists (such as Facebook), or developing a customised new community platform created for the specific brand's purpose (either from scratch or using a service such as Ning – www.ning.com).

Support and customer service

Social media is also an additional customer service channel. As consumers are increasingly comfortable transacting online, they expect the businesses with which they transact to respond to customer queries in the social space, as they would do through a call centre or email. Some customers have found that problems or questions on social media tend to be resolved more quickly, as brands are wary of having unresolved issues left out in public. For any organisation that runs a social community, customer service is often one of its primary functions.



Figure 17.3.3: Best and worst industries and brands at customer service on Twitter *Adapted From Marketing week, 2016*

It is important that brands do respond to customer complaints or queries, as platforms like Twitter keep track of response times, rates and tone of responses. Every year Twitter publishes the best and worst brands for customer service on their platform. It does not help with brand image to appear on the ten worst list.

Interestingly, social media customer service becomes collaborative, with customers assisting each other and, in doing so, reducing the reliance on the organisation for support. Collaborative support tools such as Get Satisfaction (www.getsatisfaction.com), a customer community platform, are used to great effect. According to Get Satisfaction's website, over 70 000 communities use their service, including Microsoft and Intuit's Mint (Get Satisfaction, 2016). Even businesses that use social media channels such as Facebook for customer support can see other community members helping each other.

Reputation management

Social media is a very effective tool for crisis communication and management. In certain instances, it is the place where some crises start. This can be due to offensive content, an employee saying something stupid or inappropriate, or even just angry customers sharing their complaints and getting reactions. It is important that you do not delete angry post, but acknowledge them.

Social media is also a great tool for monitoring what is being said about your brand, and to spot a potential crisis long before it becomes one. Such a 'heads up' allows your brand to mediate the crisis by being proactive and ameliorating the crisis before it takes hold. And when a crisis does hit, social media is a great space for managing your communication as it enables you to get your side of the story out.

Advertising and awareness

> **Note**
>
> Learn more about the advertising options available on social media in the Social media advertising chapter.

Where there is an audience, there is advertising. The more time users spend in social media, the more brands want to advertise there. It's not just the large numbers or users, and the time users spend on social networks that make them appealing to advertisers, it's also the rich demographic and psychographic targeting opportunities. Adverts can be targeted based on the profile information that individuals provide, either overtly or through their actions on the social network. Most social networks offer a number of advertising options that are accessible to both small advertisers and big spenders. Social advertising is dynamic, with new advertising options released regularly. Brands should experiment with the different formats and models offered by the various platforms to find the platform and ad type or format that works the best for their audience.

Sales and lead generation

Adding a social layer to a commercial transaction can create a richer experience for online consumers. These can be based overtly on social connections, or on inferred connections based on behaviour.

An excellent example of the layer based on inferred connections is Amazon's collaborative filtering. If you've browsed on Amazon.com, you will no doubt have seen product information such as 'People who bought this also bought that'. In real time, based on consumer purchase behaviour, Amazon presents products that you are likely to have an interest in, based on users who browsed and purchased products that you like. Although you may not realise it, this is a social layer on the online shopping experience. Users benefit as they are exposed to new items they may not have thought about looking for and the shopping experience is made easier and is tailored towards them. The brand benefits from additional sales on items that the user may not have considered purchasing until they were shown it.

Social communities can also be lead generation or sales generation assets. Facebook, Instagram and Pinterest already have, or are looking to include, direct shopping channels within the platform.

Search engine optimisation (SEO)

Social media plays an important role in SEO. It provides additional assets that can be optimised so that a brand 'owns' the results page for searches for their brand.

A savvy SEO strategy will also make use of social media assets, links and likes for strengthening the position of other web assets in the search engine results pages.

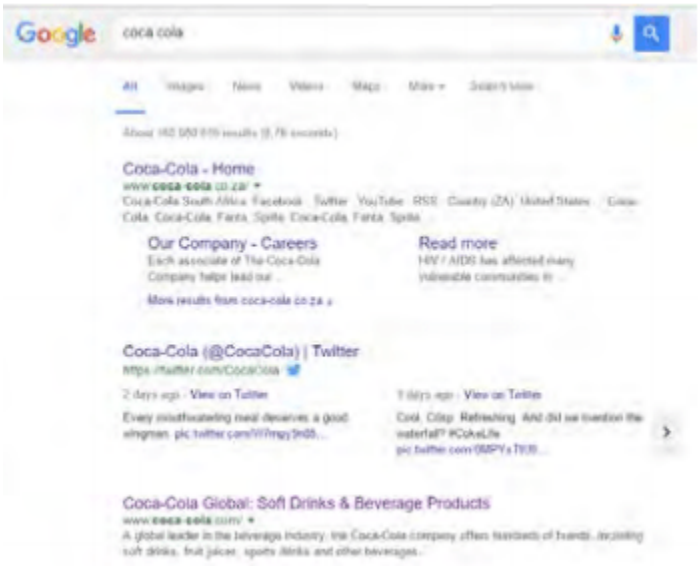


Figure 17.3.4: Coca-Cola's branded social media platforms appearing in Google search results *Adapted From Screenshot, Google, 2017*

With a little bit of planning and keyword research, a brand can use social assets effectively to own searches on their brand name. This ties back neatly to managing their online reputation, too.

Insight and research

Social media can be a very powerful insight and research asset, but the information needs to be judged in its proper context. When you are planning a campaign, social media can provide a rich source of data, both demographic and preference based. You can use the information users share freely to understand more about your market, brand or product. ORM tools help you to track mentions and sentiment, giving you insight into how you are perceived by consumers.

Using social network ad planners, such as Facebook's Ads manager or Google Display Planner (Google discontinued Ad Planner in November 2016), can give you rich information about the size of your market, and things that consumers like. You can measure sentiment and the changing number of mentions to help you understand the impact of other campaigns. These can be offline or online campaigns.

Building your online community also gives you a group you can reach out to for information and feedback, creating an always-on online focus group. However, bear in mind that these users are inherently biased just by the fact that they would join your social

community.

Social data can be very valuable, but must be treated correctly. It is qualitative and quantitative information, and is in many ways secondary research. For research purposes, it can and should be used to help form research questions for further evaluation.

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17.4: Step-by-step guide to creating a social media strategy

Social media is fast-moving, which means proper planning is vital to success. Effective social media strategies come from embracing the fact that social media is a two-way communication tool. Organisations need the resources not only to push messages out, but to deal quickly with the messages coming in, too.

Planning is the foundation of success. Here is one method to approaching social media strategically.

Step 1. Get buy-in

Getting buy-in for using social media is essential. It may be seen as a free resource, but even if you are not paying for exposure, there is a time and resource investment required. A number of stakeholders will need to be aware of your social media plans, and these may be both internal and external. And, of course, you will need sign-off for any budgeting or additional resourcing requirements.

> **Note**
>
> It is important to choose your platforms wisely, and to consider the risks of not being on social media as well!

Addressing the various stakeholders will also force you to do the necessary research and planning to take the next steps.

Step 2. Listen and understand the landscape

Social media is more than the social spaces you may interact with in your personal capacity. A good first step to understanding the full social media landscape is to listen well to conversations your target market is already having around your brand or industry.

Some important questions to answer include:

- What conversation already exists around your brand, your industry and your competitors?
- Do they have the facts?
- Where does it take place?
- Who is doing most of the talking?
- What are the emotions involved in conversations about your brand?
- What are the motivations of those that comment on your brand online?
- What can you, as a brand, add to this conversation? Is it valuable?

Online monitoring tools such as BrandsEye (www.brandseye.com) can help you with the listening part of your planning, but in the early stages you may want to start with free tools such as Google Alerts (www.google.com/alerts).

Step 3. Analyse

Using all the data you have been gathering, analyse! Think critically about social media and your brand, as well as your brand's broader marketing, communication and business challenges. All of this should be looked at within the context of the information that you already know about your local marketing and business environment.

Your outcomes here should include:

- A list of the social channels and platforms your brand should be on. This is based on who your customers are, where they interact, and where they expect to interact with you.
- Non-official groups or communities that already exist, which may have been created by fans.
- An overview of the existing conversation (volume, frequency and sentiment), as well as any content or conversation themes that occur.

- An overview of what your competitors are doing in this space.
- A list of potential brand evangelists and influencers in your industry.

Step 4. Set objectives

Your objectives are the desired outcome of your social media strategy. Your ultimate objective, as to what social media should achieve for your business, should be established upfront and be based within the context of your marketing and business challenges. After listening and analysing you can now set specific social media objectives that will feed into your overall outcome. You need to identify exactly how you will use social media to reach the business objectives for your organisation, and then set SMART objectives that will help you to achieve these.

To make them tangible and measurable, establish key performance indicators (KPIs) for your objectives, with benchmarks and targets where appropriate. Determine SMART objectives shown below.

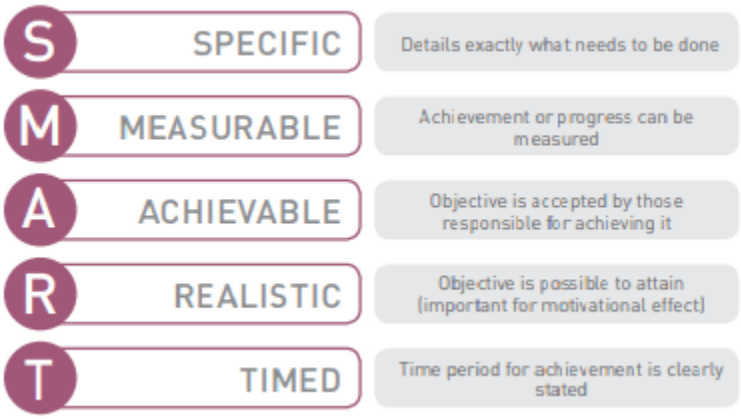


Figure 17.4.1: The various elements of a SMART objective

For example, your objective could be to grow a community of fans around your brand in a particular country. Your KPI might therefore be fan numbers, and you could set a target of 5 000 Facebook fans over six months.

Step 5. Create an action plan

Once you have a clear idea of what you want, you can begin compiling an action plan to get there.

This is where you need to make sure that you have created the necessary documents and processes that form the foundation of your plan. Remember to keep your and chosen platform in mind when making these plans. You will need to:

- Decide on the roles and responsibilities of the project team and other stakeholders.
- Determine what social media tools you will use.
- Commit to a frequency and volume of activity, and how quickly you will respond.
- Develop a conversation plan.
- Create tone of voice guidelines, frequently asked questions, community guidelines and content plans.

Step 6. Implement

This is the fun part! It's time for your plans to kick off and put all that research and thought into action. Set up your platforms according to the specific guidelines for the platform. Most platforms have helpful and informative guidance for businesses wanting to be on their site. They also provide brand packs and assistance in establishing yourself on the site. Pinterest, for example, offers detailed guidance on their platform, see: https://business.pinterest.com/en.

Alert stakeholders that you are starting your engagement plans, and make sure you have tracking in place. Continue to monitor for mentions of your organisation and responses to your messages. Keep to your general plan, but be prepared to adapt.

Step 7. Track, analyse, optimise

The beautiful thing about digital marketing is that you can track every single user interaction and use this information to learn from and improve your efforts continually. You should track the success of your social media campaigns on an ongoing basis, and set milestones for your team at less frequent intervals (every couple of months or so), when you will sit down and do an in-depth review.

There are several tools you can use for tracking social media. You will need to build a suite of tools to suit your measurement and reporting requirements.

Platform insights

From the previous chapter you saw how each major platform offers its own analytics to businesses and brands that sign up for business pages or profiles. These are a useful starting point for reporting on your social media efforts, from numbers of followers or fans, to interactions with the content you share.

Web analytics

If you are using social media channels to send traffic to your own website, you should tag the links so that you can segment that traffic in your website reports.

> Note
>
> Read more about this in the Data analytics chapter

In Google Analytics (www.google.com/analytics), you would use campaign tracking parameters.

URL Shorteners

URL shortening services such as bit.ly, goo.gl and ow.ly offer usage data that will tell you how many users click on links you share, when they click on them, and where in the world they are from.

UTM parameters

> Note
>
> UTM stands for Urchin Tracking Module because Urchin Tracking was one of the original web analytics software developers who came up with these tags.

UTM parameters are short text codes that you add to a URL to track data about users and traffic sources. UTM parameters are also known as UTM codes or UTM tags. UTM parameters do not modify any content on the site, but are simply for tracking purposes (Hootsuite, 2017).

UTM parameters help you to analyse how each of the marketing channels you have invested in, such as search, display, or social, have contributed to your campaign. You will be able to see which channel sent the most number of users to your site, what the conversion rate of the various channels are and which channel offers the best return on investment. You can also organise your data so that you can compare different campaigns to assess content, timing, distribution platforms, and so on. They are invaluable tools (Kissmetrics, 2017).

Here is an example that you saw in Chapter 16. Note the UTM tag at the end of the URL.

www.redandyellow.co.za/5-way...er-women/?utm_ source=newsletter&utm_medium=email&utm_campaign=AugNewsletter

You can read more on how to use UTM parameters at https://blog.kissmetrics.com/ utm-parameters-video/ which also includes a video on how to use UTM tags on Google Analytics.

Online monitoring software

Online monitoring software, also known as sentiment analysis or opinion mining software, is an important measurement investment that you will need to make. It helps you to keep track of all mentions of your brand, and to understand the sentiment and influence of those mentions. You should be tracking your reputation for trends and changes over time. Some popular choices are: BrandsEye (www. brandseye.com), Brandwatch (www.brandwatch.com), SEM Rush (www.semrush. com) and Hootsuite (www.hootsuite.com) (Ganot, 2016).

Social media dashboards

There are a number of services that make it easier for you to centralise management of your social media properties, as well as making collaborative management easier. They also integrate analytics data from a number of sources, making reporting easier.



Figure 17.4.2: Twitter Profile overview on Hootsuite *Adapted From Social media examiner, 2016*

Note

Some dashboards even let you schedule or respond to posts directly from the interface.

Some services include:

Everypost (http://everypost.me)

Buffer (http://buffer.com)

Hootsuite (www.hootsuite.com)

Nuvi (https://www.nuvi.com/)

Sprout Social (www.sproutsocial.com)

Socialbakers (www.socialbakers.com)

Tweetstats (www.tweetstats.com)

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17.5: Documents and processes

Good documentation and processes are the foundations of social media success and your social strategy is likely to involve many stakeholders from across your organisation. Processes and guidelines ensure consistency across the various channels. These should be created, agreed on, and approved before you take any action on social media.

Start with the documentation and processes you already have in place for marketing and communication, for example, brand and tone of voice guidelines, or PR policies. Build on these to create a robust foundation that suits this spontaneous, dynamic space.

A social media checklist is a good starting point to make sure that you have everything in place. Examples of the checklist, conversation calendars and escalation protocols are also included for you.

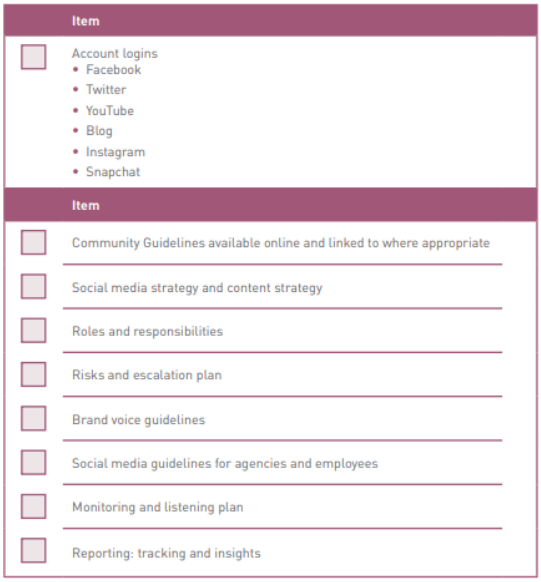


Figure 17.5.1: The social media checklist

Community guidelines

As well as a privacy policy and terms and conditions, it's a good idea to establish community guidelines for the communities you manage, especially when the community is on behalf of a brand. Community guidelines help to set the tone for the community, and are useful to refer to should members behave in a way that is undesirable. Guidelines indicate what will, and will not, be tolerated, such as hate speech, profanity, discrimination, or other inappropriate content. Of course, community guidelines don't prevent such behaviour, but are useful to fall back on should you need to remove comments or community members.

Guidelines should be friendly, with the tone in keeping with your community or brand.

Many social media platforms provide their own guidelines that all users, including brands, have to adhere to. Failure to adhere to any of the guidelines could get you removed from the platform.

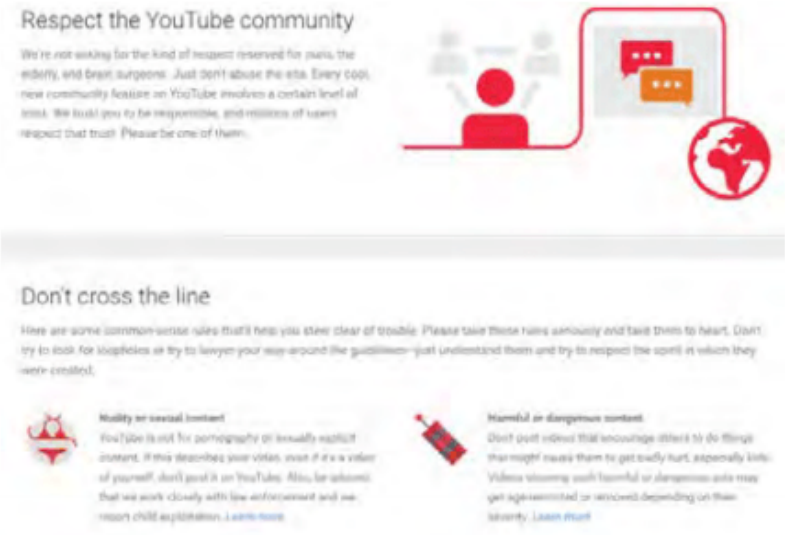


Figure 17.5.2: Part of the Community guidelines of YouTube, 2016 *Adapted Form Screenshot, YouTube, 2017*

As well as recommendations for members' conduct and the types of material that can and cannot be shared, guidelines should include information about how and who to report violations to. Methods for members to protect their personal information and intellectual property are also important things to include.

Content plan

Content plans help you to plan your community conversations and the messages you send. We suggest weighting your content to your objectives. Decide on what you want to achieve with each objective, and by when, and what level of priority it is for your business. Map these objectives weekly and monthly as necessary. Then create weekly or monthly content plans around these objectives, based on each objective's relative priority for your business per week.

For example, if your objectives are brand awareness, sales and app installs, you need to weight them according to their importance. If your main objective on social media is brand awareness, make this 50% of your content plan. This means that 50% of all content you post will be aimed at increasing brand awareness. If the other two objectives are equivalent, then content driving sales and content driving app installs should each make up 25% of your content plan. If this changes over time, so that in week three, you want app installs to be your most important objective, then content driving app installs becomes 50% of your content plan, with content promoting brand awareness dropping down to making up only 25% of your content plan.

Content plans are useful, centralised planning documents that ensure that various teams are all aware of each other's efforts, and that communications are integrated. For any kind of content and communication strategy, content plans are invaluable. Be sure your content plan speaks to your objective, your brand identity, your chosen target audience, and the themes or topics you have selected.

As you learnt in the Content marketing strategy chapter, reaching social audiences requires that you create content that truly resonates with them. Successful social content must be interesting, relevant, shareable, and remarkable. It is especially useful to plan and create social content around your content pillars, since this gives you a solid structure and starting point to follow.

> **Note**
>
> Read more about this in the Content marketing strategy chapter.

To start creating a conversation calendar, you should plot everything that is relevant to your community. This could include public events, dates and anniversaries, or events and communications already planned by your organisation.

You should also use your conversation calendar for reporting. Keeping track of interactions and responses to your planned posts

will help you to determine what kind of posts your community responds to, what days are best for posting, and what frequency works best for your community.

CoSchedule, a content marketing editorial calendar software, provides some guidance on how often to post on each platform. Some platforms like Twitter and Pinterest require frequents posts each day, while Facebook, Instagram and LinkedIn require less posts (Neidlinger, 2016). However, with platform algorithms changing all the time, the frequency of posts is becoming less important. A great post will circulate and appear in newsfeeds for much longer because it has good relevant content.

Brands should only post content relevant to their objectives and not to fill spaces on a content calendar. Posting poor content to meet a prescribed number of posts, may end up negatively impacting on your brand. Because of the algorithms, competition for brands to create good content is becoming intense, but ultimately the user will get to experience better organic content. Some brands may have to resort to paid media to get their posts seen at all. Ultimately the content you choose to create and the frequency of your posts, should be informed by your community on each platform.

Planning the conversation helps to keep momentum, especially in the early days of building a community. However, it should not replace spontaneity, this is a conversation, after all!

Date	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Theme							
Image							
Facebook							
Twitter							

Figure 17.5.3: An example of a conversation calendar

> There are many fields that can go into a conversation calendar (such as suggested copy, links, and more). Take the basic calendar provided in Figure 9. and adapt it to your needs and preferences.

Communication and escalation protocol

An established communication and escalation protocol helps to ensure that all parties are aware of procedures for handling social messages, and can respond as appropriate. This is especially important for large organisations where several users might be interacting in social media on behalf of a brand, or where several departments or agencies have a stake in the organisation's social media presence.

A communication and escalation protocol should include:

- Anticipated messages, frequently asked questions and appropriate, standard responses (for both positive and negative situations).
- Guidelines for determining the sentiment and risk of messages, which includes a flagging system for comments that need more senior attention.
- The crisis management process to follow if a brand crisis erupts on social media.
- An escalation plan for messages that need signoff or further consideration.

> **Note**
>
> Make sure that all stakeholders understand their roles, and appreciate that social media interactions often need to be handled quickly.

- Contact details of relevant stakeholders.
- Guidelines for responding, including response rate, standard messages, brand voice and tone.

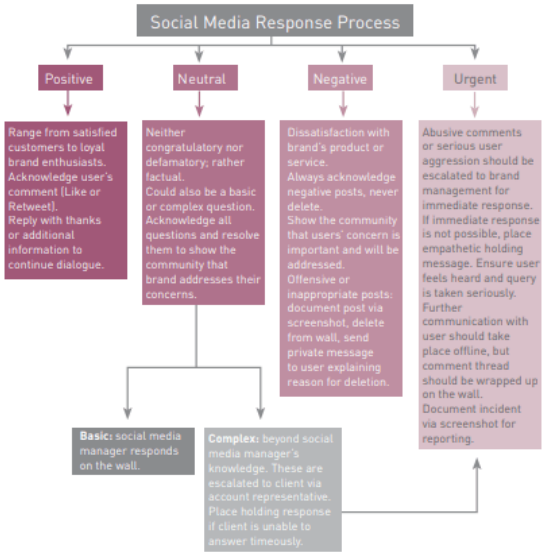


Figure 17.5.4: A decision flowchart is a useful way of disseminating information

* Note: this process was created predominantly for Facebook, but these basic principles apply to most social media networking platforms.

Adapted From Stokes, 2013

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17.6: Dealing with opportunities and threats

The use of social media has equipped consumers with a voice and a platform, and the ability to amplify their views and truly inform their decision making. The connected nature of the Internet makes these views easy to share, and the accessibility of social media tools makes it easy for other consumers to find these views, and respond and build on them. All of this contributes to the perception of the brand.

The best way to show that you are listening to customer comments, complaints and questions online is the same as with a normal conversation. Comment when it's appropriate, listen with interest, be polite, be respectful, and add value wherever possible. Brands should become active participants in the conversation.

Brands that are successful in communicating with their audiences are constantly on the lookout for opportunities to propel their brand forward, and are keeping their eyes peeled for risks that may threaten their reputation. In both situations, the power sits in how the brand responds. This response can range from a direct engagement to a full new marketing campaign. Ultimately it depends on how powerful the opportunity or risk is.

An extreme example of successfully grabbing a social media opportunity, is Morton's, an American steak restaurant chain. One weary business traveller jokingly tweeted Morton's asking them to deliver him a porterhouse steak at the airport when he landed. The Morton's social media team were listening and responded by ensuring that the customer was met at the airport with a steak. This social media stunt garnered enormous media attention, a very loyal brand advocate, and a hefty increase in sales for the following weeks (Herrman, 2016).



Figure 17.6.1: Morton's restaurant responding to a customer tweet and earning themselves great media publicity *Adapted From Gizmodo, 2011*

When to talk (and when not to)

When everything being said is nice

A fantastic position to be in is that every possible mention is overwhelmingly positive. Well done. However, that does not mean that there is nothing to do. During this time, the brand must do everything in its power to drive high volumes of conversation.

Stakeholders are being positive about the brand because their expectations are being exceeded. Unfortunately, expectations change. Brands need to stay on their toes and constantly be on the lookout for new and innovative ways to meet and develop their brand promise.

When everything being said is neutral

If this is the case, it sounds as if the company is very boring and is not a good way to get attention. As Seth Godin puts it, "Safe

is risky" (Godin, 2010). If a company is playing it so safe that no one can be bothered to send either praise or criticism its way, it's in danger of being forgotten. The next step is no one talking about the company at all.

When negative things are being said

Negative statements can often be understood as broken brand promises. There is underperformance on expectation, and it must be dealt with as a matter of high priority. During this period, brands need to be very careful not to stir up any more conversation than is absolutely necessary. That said, it's certainly not all doom and gloom. If the conversation is broadly negative, it is normally because there is some underlying problem, and this information provides the business with focus to resolve it.

> Note
>
> In fact, resolving a serious complaint to the customer's satisfaction can gain you a loyal brand advocate; someone who has first-hand experience that your brand cares and goes the extra mile.

Complaints are from stakeholders who have had dealings with a company that hasn't met their expectations. By complaining, this customer is, often unwittingly, giving the company the opportunity to make things right, and is probably indicating where the company can improve. Usually, the skilled customer service department of a company should deal with these. They should also share resulting insights with the business strategy department so that the underlying problems can be prioritised and resolved.

If a complaint is online, the resolution should be there as well, although you can try to have it taken offline first. Even though the customer service will likely take place either over email or by phone, posting a personalised comment in a blog post, for example, will demonstrate to the community that the company listens, responds, and serves the critical objective of actually resolving the underlying issues. Criticism need not necessarily come from customers, but it is important to be aware of it. If a criticism involves false information, it should be corrected. And if the criticism is true, then it should be dealt with as such.

Responding

Responding involves recognising that consumers hold the upper hand in the relationship. They are better trusted, there are more of them and, in most cases, the barriers to exit from a brand are relatively low. Customers dictate the channels of communication. An organisation needs to go to the consumer, not the other way around. Ignoring this will result in the business losing customers because they not willing to truly engage. This is why it is so important to research your audience and tailor your strategy to them and not vice versa.

Responses to customers on social media should be personalised for each individual. Do not use blanket responses.

> Note
>
> Read more about this in the Market research chapter

When responding, be transparent, be honest, and treat the person as you would like to be treated. At all times, remember that you are engaged in conversation, not a dictation.

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17.8: Step-by-step guide for recovering from an online brand attack

These rules to recovery provide a practical approach for brands facing an online threat.

Step 1. Be prepared

No brand is immune from an online brand attack. The best brands have strategies in place to identify a reputation crisis immediately and respond to it quickly enough to stop the negative word of mouth from spreading.

Keep your brand in front of consumers by engaging in the conversation. This can be done by making use of blogs, communicating with customers, and being as open and honest as possible. Engaging in, and leading, the conversation allows you to build an authentic voice. If a crisis hits, you will be well placed to respond in a way that is authentic.

Step 2. Act immediately!

The easiest way to solve most brand attacks is to respond quickly. A brand that shows it is listening and does indeed care will go far when it comes to ensuring a solid online reputation. Acknowledge what has been said and react accordingly.

Step 3. If what they're saying is false

If the attack on your brand is factually incorrect, send the person evidence that they are wrong, and in a friendly tone, ask them to remove or retract the entry, and offer to keep them informed of future news. If the person doesn't react or respond, add a comment to the post that it has been addressed.

> **Note**
>
> Cultivating a loyal community of fans can help immensely when clearing up false information. You will look much more credible if your fans back up your statements.

Step 4. If what they're saying is true...

If the mention is negative but true, send your side of the story and try as hard as you can to take the conversation offline. If appropriate, apologise quickly and sincerely, and offer to make amends.

Step 5. Keep the negative pages out of the search engines

Keeping more users from reading negative things about your brand is imperative. Knock them off the first page of the results with basic SEO and some social media pages, such as Facebook, Twitter or blog posts. Keep adding pages and links until you've forced the offending pages out of sight.

> **Note**
>
> Read more about this in the Search engine optimisation chapter.

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17.9: Social media strategy risks and challenges

Any social media strategy should account for the risks and challenges of interacting in this environment, and should incorporate a protocol for dealing with these risks. Mistakes on the web can take a long time to recover from.

Some of the common risks and challenges are listed below.

No one cares. Especially when building a community from scratch, it can be difficult in the beginning to get the traction you want. This is why understanding the landscape in the context of your organisation's market is so important. Make sure you are interacting in the spaces where your customers are, and where they are happy to hear from you.

The social media space is used by unhappy customers (who are free to post detractive comments). Even if the only feedback you are getting is negative, this is good feedback! Now you have an opportunity to do something about it.

It requires ongoing attention and monitoring. Social media channels may be free, but there is still a time and resource investment required to make your strategy a success. Understand what your objectives are for using social media, and budget the time required to meet those.

It can be difficult to measure the impact of the campaign. Social media can be difficult to measure, but that does not mean your campaigns are not successful. Don't expect to find a solution (or success) overnight. Start with measuring things that can be measured easily, and watch for case studies in this space that will help you to turn your social media investment into revenue for your organisation.

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17.10: Case study - Fjordland's 2015 Christmas campaign

One-line summary

Fjordland decided to run their Christmas marketing campaign exclusively on Facebook. The results showed a rise in sales, improved engagement and a substantial decrease in cost per click. All of this was achieved on a third of the usual campaign budget.



Figure 17.10.1: Fjordland's Christmas elves *Adapted From Digital training academy, 2016*

The challenge

Fjordland, a Norwegian food manufacturer, produces easy-to-make dinners and dessert dairy products. For its last three Christmas campaigns, the company offered a quiz on its website to introduce users to its Christmas products. In 2012 and 2013 the brand had used TV and banner ads to direct traffic to their site. In 2014 they included social media, in the form of Facebook. The results for Facebook were very promising.

The aim of the 2015 Christmas campaign was to focus the brand's attention and budget on one channel, maximise the number of website visitors and increase sales.

The solution

Fjordland chose Facebook as their single channel of focus for their 2015 Christmas campaign, because of its high levels of reach and engagement.

Fjordland researched its target audience and identified that they liked polls, product related promotions and meal suggestions. The brand strategically used this information to create content using these elements featuring a pair of Christmas elves. The Facebook campaign, which was optimised for desktop and mobile, included video, photo ads and link ads. The Facebook ads and posts directed customers to the Fjordland quiz website, for the chance to win a holiday.



Figure 17.10.2: The Fjordland posts and ads on Facebook *Adapted From Digital training academy, 2016*

The results

Having a Facebook only campaign proved highly profitable for Fjordland. Their website traffic doubled, they saw a 14% uplift in year-on-year sales and experienced a 90% decrease in cost per click. All this was achieved on a third of the budget of previous years, providing an incredible ROI.

The power of social media is evident. Social media, and Facebook in this instance in particular, are more efficient than traditional banner ads with regard to reach, engagement and cost per click. For Fjordland, Facebook had even beaten TV advertising.

The Digital Manager at Fjordland noted the 'always on' nature of Facebook and its incredible segmentation possibilities made it a powerful and efficient channel. They were exceptionally pleased at the results of choosing to focus on Facebook as an exclusive channel for this campaign (Digital training academy, 2016). To read more about this, look here: www.digitaltrainingacademy.com/casestudies/2016/06/switch_from_tv_and_banners_to_facebook_ boosts_sales_for_fjordland.php#more

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17.E: Social media strategy

Case study questions

1. What strategic aspects of social media did Fjordland consider when electing to focus solely on social media?
2. What other aspects of social media would you have included in your campaign strategy?
3. Would you recommend using an exclusive channel as part of your marketing strategy? Why or why not?

Chapter questions

1. What are some of the pitfalls of engaging difficult customers on social media platforms?
2. What skills do you think are important for a great community manager to have?
3. Should all brands be active in social media spaces? What brands have less to gain from trying to create an online community?

Further reading

www.socialmediaexaminer.com – Social Media Examiner offers practical advice, tips and strategies for engaging on social media.

www.socialmediatoday.com – Social Media Today offers news, insights and analysis of social media trends.

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17.S: Social media strategy

Social media can be used strategically in a number of marketing and communication challenges:

- Community management
- Support and customer service
- Reputation management
- Search engine optimisation
- Communication and outreach
- Advertising and awareness
- Sales and lead generation
- Insights and research.

Creating a social media strategy requires careful planning, and a strong foundation that will allow you to be dynamic.

The steps to creating a social media strategy include:

- Get buy-in
- Understand the landscape
- Analyse
- Set objectives
- Create an action plan
- Implement
- Track, analyse, optimise!



Figure 17.S.1: The steps involved in a social media strategy

Social media is a vital strategic consideration for any brand. Whether your organisation is actively involved in social media or not, your consumers are. If nothing else, this means that there is market data available to you, if you just take a little time to find it.

Organisations that make a considered move in the social media sphere will find it both challenging and rewarding. The rapid feedback loop can often change preconceptions or even marketing plans, as the voice of the customer is amplified through social media. In addition, the collaboration with passionate customer stakeholders is extremely rewarding.

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18: RETAIN - DIRECT MARKETING (EMAIL AND MOBILE)

Learning Objectives

In this chapter, you will learn:

- The basics of email strategy.
- How to structure and design an effective marketing email.
- How to plan and execute a successful direct marketing campaign using email.
- Techniques for measuring and optimising your email campaigns.
- How mobile can tie into and enhance your direct marketing campaigns.

18.1: Introduction

18.2: Key terms and concepts

18.3: Direct marketing strategy and planning

18.4: Step-by-step direct marketing process

18.5: Measuring success

18.6: Tools of the trade

18.7: References

18.8: Advantages and challenges

18.9: Case study - GlobalGiving

18.10: The bigger picture

18.E: Direct marketing - email and mobile(Exercises)

18.S: Direct marketing - email and mobile

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18.1: Introduction

Direct marketing is all about communicating directly to customers rather than indirectly, via ads or billboards. Direct marketing via digital generally involves email, and to some extent, mobile channels.

At its core, email marketing is a tool for customer relationship management (CRM). Used effectively, this extension of permission-based marketing can deliver one of the highest returns on investment (ROI) of any digital marketing activity (the principles covered in this chapter can apply to any kind of permission marketing). Simply put, email marketing is a form of direct marketing that uses electronic means to deliver commercial messages to an audience. It is one of the oldest and yet most powerful of all digital marketing tactics. The power comes from the fact that it is:

- Extremely cost effective due to a low cost per contact
- Highly targeted
- Customisable on a mass scale
- Completely measurable.

Furthermore, email marketing's main strength is that it takes advantage of a customer's most prolific touchpoint with the Internet, their inbox.

In January of 2015, the number of emails opened on mobile phones overtook the number of emails opened via desktop. A large number of users first read their emails on mobile, according to Litmus, Desktop represents 19% of email opens, webmail represents 26%, and mobile represents 55% (eMailMonday, 2016). Depending on the market you're targeting, and lower-end markets are fast catching up, if you send an email, it will at some point be opened on a mobile phone.

In other words, you cannot think about email without thinking about mobile at the same time.

Like mobile-specific channels, email marketing is a tool for building relationships with both existing and potential customers. It should maximise the retention and value of these customers, which should ultimately lead to a greater return on investment.

> Some people consider email marketing to be old fashioned, arguments about its demise have been going on for years, but it can be one of the most powerful tools in your digital arsenal.

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18.2: Key terms and concepts

Table 18.2.1

Term	Definition
Alt Text	The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a user what an image is about and displaying the text in instances where the image is unable to load. Also called alt tag.
Business-tobusiness (B2B)	When businesses sell products or services to other businesses and not to consumers.
Business-toconsumers (B2C)	When businesses sell products or services to consumers.
Call to action (CTA)	A phrase written to motivate the reader to take action such assign up for our newsletter or book car hire today.
Clickthrough rate	The total clicks on a link divided by the number of times that link was shown, expressed as a percentage.
Customer relationship management (CRM)	A strategy for managing a company's interactions with clients and potential clients. It often makes use of technology to automate the sales, marketing, customer service and technical processes of an organisation.
Database	In email marketing, the database is the list of prospects to which emails are sent. It also contains additional information pertinent to the prospects.
Domain name system (DNS)	DNS converts a domain name into an IP address. DomainKeys, an email authentication system designed to verify the DNS domain of an email sender and the message integrity.
Double opt-in	The act of getting subscribers to confirm their initial subscription via a follow-up email asking them to validate their address and hence opt-in again.
Email service provider (ESP)	A service that helps you design and send emails.
Hard bounce	The failed delivery of email communication due to an undeviating reason like a non-existent address.
Internet Protocol (IP) Address	An exclusive number that is used to represent every single computer in a network.
Internet service provider (ISP)	The company providing you access to the Internet, for example, MWEB, AOL and Yahoo!.
Open rate	The percentage of emails determined as opened out of the total number of emails sent.
Opt-in	Giving permission for emails to be sent to you.
Opt-out	Also known as unsubscribe. The act of removing oneself from a list or lists so that specified information is no longer received via email.
Return on investment (ROI)	The ratio of profit to cost
Sender ID	A method used by major ISPs to confirm that an email does originate from the domain that it claims to have been sent from.
Soft bounce	The failed delivery of an email due to a deviating reason like an overloaded email inbox or a server failure.

Spam	Email sent to someone who has not requested or given authorisation to receive it – EVIL!
Unique forwarders	This refers to the number of individuals who forwarded a specific email on.
White list	A list of accepted email addresses that an ISP, a subscriber or other email service provider allows to deliver messages regardless of spam filter settings.

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18.3: Direct marketing strategy and planning

The first part of any digital direct marketing campaign should involve planning for the goals you need to achieve. Email and mobile marketing can be used as a tool to help you achieve your business and website goals. As with all tactics, direct marketing should be considered in line with your overall business, marketing and digital strategy.

As discussed in the chapters on analytics and conversion optimisation, you will decide on the key performance indicators (KPIs) for your campaign. KPIs are the metrics that indicate how well you are performing.

> **Note**
>
> Read more about this in the Conversion optimisation, and Data Analytics chapters.

You have a few options for digital direct marketing:

- Promotional emails
- Newsletters
- Transactional emails
- SMS marketing.

Promotional emails will usually have an immediate goal:

- Users make a purchase
- Users download some content
- Users request further information.



Figure 18.3.1: An example of a promotional email from Joss & Main *Adapted From Screenshots, 2016*

Newsletters tend to focus on longer-term goals and are usually geared at creating and retaining a long-term relationship with the reader so your KPIs are more important here.



Figure 18.3.2: An example of a retention-based newsletter from MarketingSherpa *Adapted From Screenshots, 2016*

Transactional emails are generally automated emails that inform customers of payments, subscriptions, or changes to their account. This category can also include confirmation email or reminders.

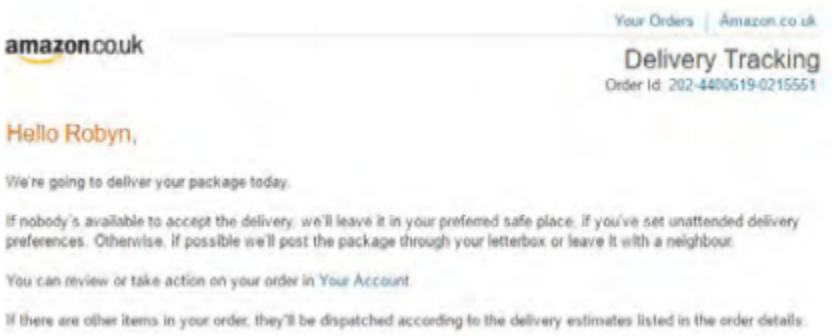


Figure 18.3.3: An example of a transactional email from Amazon UK *Adapted From Screenshots, 2016*

An SMS can be used in much the same way as a promotional or transactional email; to let the customer know about products or specials, deliver coupons, or send transactional reminders.

Note

Read more about SMS in the Mobile channels and apps chapter.

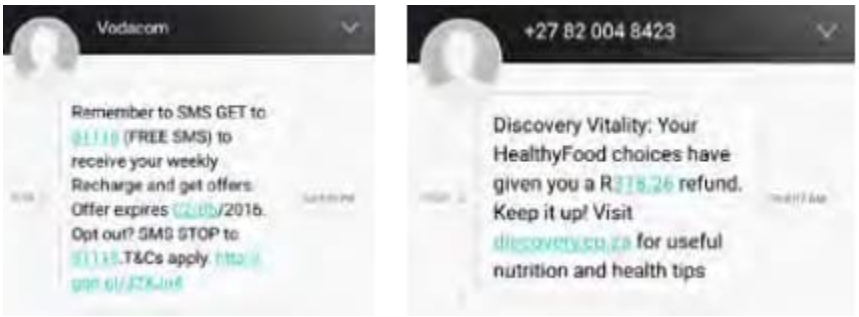


Figure 18.3.4: Left: A promotional SMS from Vodacom. Right: A transactional SMS from Discovery *Adapted From Screenshots, 2016*

Email service providers

An email service provider (ESP) is a partner who can help manage your email design and send. For bigger organisations, it often makes sense to purchase your own software and server, or partner with an ESP. This is especially true if you are sending more than 50 emails at a time. Most ESPs are do-it-yourself services that do not manage or strategise your campaign, but give you the tools you need to manage it yourself.

> **Note**
>
> We have listed some ESPs in the Tools of the trade, section 18.6, at the end of this chapter

There are some important questions to ask when choosing an email service provider.

- How easy is it to use? This is important if you are managing the campaigns yourself.
- Can you upload and migrate the contact list? It's important that you own your lists.
- Is the process self-service or managed?
- How does the reporting work?
- What is their deliverability like?
- Are they endorsed by email and deliverability authorities, such as Return Path or Trust-e?
- Do they adhere to best practices for direct marketing?
- How is the data stored, processed and secured? Who owns it?

Using mobile for direct marketing

You will remember from the Mobile channels and apps chapter that users see their mobile as a personal device and can resent intrusions on it. This means that there are certain principles you'll need to keep in mind if you plan to use mobile for direct marketing purposes.

Privacy and permission

One of the most important principles for mobile is privacy. Users see their mobile as a very personal device; they do not respond well to unsolicited marketing messages invading that privacy. The location-based nature of mobile also presents some challenges to user privacy. No one wants their location published without their permission, and users need to be able to control notifications.

For a business to avoid damaging its brand by coming across as invasive, marketers using mobile need to use permission marketing and make it clear that they will value and respect users' privacy. Users need to opt in to marketing messages, and should be able to opt out at will. A strong database of preference profiles and constant maintenance of consent can drastically reduce the risks and make users feel more in control of their marketing experience

> **Note**
>
> Remember that many countries have legislation governing the collection, storage and use of personal data. Make sure that you follow the laws of your country!

> Take a look at how Hindustan Unilever targeted low-income consumers to build a permission database in an area with vast basic mobile penetration but relatively little smartphone presence: http://www.digitaltrainingacademy.com/ casestudies/ 2016/03/mobile_case_study_coffee_giant_wins_loyalty_with_ mobile_airtime_rewards.php#more

Value and reciprocity

The best way to avoid coming across as invasive and intrusive for mobile users is to ensure that every message you send them on this personal device is valuable to them. Push notifications from apps, for example, have a high engagement rate, but users

won't opt in unless you are offering clear value and have taken the time to build up some trust. Digital consumers have far too many distractions vying for their attention to pay attention to an unsolicited marketing message that gives them nothing.

Offering value to mobile users does two things: It helps to build up relationships, and as a result, loyalty, and, it uses the principle of reciprocity. If you give consumers something, they are more likely to be willing to give something back.

For this reason, any messages you send directly to users should be helpful and set the customer up to remember you in a positive light. For example, a hotel could send a confirmation SMS, a reminder or a way to shorten the check-in process, or a query about whether the guest needs anything upon arrival. None of these would be seen as intrusive.

Offering real value to your consumer won't amount to much if they're not reading the messages you send, which they won't if they don't trust you. To build up that trust, you need to consistently invest in a value exchange; their attention for your message.

Relationships

If you practice permission marketing and offer value to your mobile audience, you will ultimately build a stronger relationship with your customers. These relationships can result in a higher customer lifetime value as well as positive sentiment, which can be spread by your audience and result in more converts to your brand.

Because mobile's ability to connect you to your customer at their moment of need is unparalleled, so is its ability to help you build a connection with your brand's followers. When used well, mobile devices offer an effective way to build strong relationships, and those relationships should be your primary focus.

Choosing an SMS/MMS service provider

There are some important factors to consider when choosing an SMS/MMS provider. Here are some key questions to ask about any potential service provider:

- Can you pre-check cell numbers with networks and carriers to find out which numbers are MMS-enabled?
- How does the reporting work? What can you measure?
- Do they optimise the MMS for the screen size of the phone?
- How good are their creative services? Make sure you see some examples of previous work to assess their skills.
- Do they provide and manage an opt-out service?
- What are the personalisation options?

Email on mobile

You now know that most email is opened first on a mobile device. Users expect an engaging, attractive experience across devices, so an email that isn't formatted for a mobile device isn't going to get a good response and many users will simply delete the email or even opt out rather than opening it again on desktop.

This presents a challenge for email design. The mobile screen is obviously much smaller than a desktop screen, so the way an email is displayed differs as well. Not only that, but different mobile devices have different screen sizes, and they make use of different mobile operating systems. This means that each one has different standards and default settings and renders emails in a unique way.

To make things even more difficult, very few users view an email on only one device. They may switch from their smartphone to their laptop to their tablet and back to their mobile phone during the course of a day. This means that, although sending two versions of your email is an option, one for mobile, one for desktop; it's probably not the best solution. You want an email that displays well across as many different clients and operating systems as possible. One way to achieve this is through responsive email design.

> **Note**
>
> Read more about this in the Web development and design chapter.



Figure 18.3.5: The Marketing Charts email template responds to the screen size of the device on which it is viewed *Adapted From Screenshots, 2016*

Some smartphones do render HTML emails and can auto-fit them to fit the mobile screen, but this can still affect the way the email displays.

The most important things to keep in mind when designing an email for mobile are:

> **Note**
>
> Don't worry if some of this sounds a bit too technical. Your web developer will understand and be able to advise you.

- The screen is a lot smaller
- Inputs can vary, with touchscreens being the most common.

So, your content must be easy to skim, with clear calls to action.

Here are some common best practices to follow when designing your emails, to ensure optimal rendering on mobile devices:

- Generally, most emails are designed to be 600px wide to display well in an email preview pane and this scales well on typical mobile screen sizes. On a 320px screen, an email can be zoomed out to 50% and display perfectly; similarly, on a 480px screen it can display at 75%.
- Host your email newsletters online and link to them from your preheader. That way, anyone who opens your email on a mobile can click straight through to an HTML version of your newsletter.
- Design your email in a grid system. This means your content needs to be laid out in vertically and horizontally aligned blocks, with gaps in between. Doing this will make it easier for various operating systems and email clients to scale your email down to fit a mobile screen. This is not a guarantee that the email will display properly in mobile, but it should solve the problem for most mobile devices, such as iPhone and BlackBerry, which auto-fit HTML emails.
- Make sure that you include alt text for your images! Your email needs to convey its message with or without images.
- Mobile devices that don't automatically scale your email down will display the content on the left of your email first. Make sure that your most important content is placed here.
- Button links need to be at least 44px to render well on mobile phones. Smashing Magazine recommends 72px so that users can easily tap buttons with their thumbs and see visual feedback that the button has been pushed.

Something important to remember: design for touch.

Many mobile devices have touchscreens. This means that, instead of clicking on your links with a mouse, users will be tapping your links with their fingers. If your links are placed too close together, it will be difficult for users to click on one link without accidentally also tapping the other. To make the user experience easier, make sure your links are placed in a 30–45px area, with a margin of at least 15px around them. By spacing links like this, it will be easier for touchscreen users to follow through on your call to action.

Rules and regulations

There are a number of laws across the world to protect users from unsolicited emails and SMSs and stop businesses from abusing these communication channels. While they vary in severity according to the country and we recommend that you do some research into your local legislation, it's important to acknowledge two very important rules.

First, you cannot send communications to someone without their permission. Second, if someone requests to be unsubscribed from your communication, you have to meet their request or face penalties in many jurisdictions. This means including an unsubscribe option for emails and an "SMS 'stop' to opt out" option for SMS.

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18.4: Step-by-step direct marketing process

Growing a database

Running a successful direct marketing campaign requires a business to have a genuine opt-in database. This database, or, list of subscribers who have agreed to allow a company to send them emails or SMSs with marketing messages, is the most valuable asset of a direct marketing campaign.

Permission must be explicitly given by all users to whom messages are sent. Companies that abuse this can put their reputation in jeopardy, and in many countries, legal action can be taken against companies that send unsolicited bulk messages also known as spam.

It is important to track the permissions that are generated for each user. A time stamp is a key part of the data capture and opt-in process and helps to protect you against spam complaints and potential legal action.

Spam is unsolicited bulk email or SMS messages. It means that the recipient has not given permission to be sent that message. While estimates of spam differ, Statista (2016) shows that the amount of email spam has dropped from over 70% in 2014 to around 55% in 2016. SMS Promotions (2016) indicates that the amount of SMS spam differs according to region, from around 1% of total messages in North America to around 30% in Asia.

Growing this database while keeping it targeted is a key factor in any direct marketing campaign. The database need have only one entry, the prospect's email or phone number, but the following should also be considered:

- Name, surname and title
- Date permission granted
- Source of permission
- Gender
- Country
- Date of birth
- Phone number or email (depending on which you already have)
- Frequency (how often they'd like to hear from you).

Fields such as name, surname and title should be separated in your database. You should also gather date of birth as opposed to a prospect's age as it ensures that your database can stay up to date.

Don't be tempted to ask for more information than required. The more information a marketer can gather, the better he or she can customise marketing messages. However, the more information a prospect is required to give, the less likely they are to sign up. Further information can be requested over time.

> **Note**
>
> As always, the best long-term strategy for growing your database is to create valuable, shareable content that users want to read.

There are many ways to attract prospects to opt in to a database. An email sign up form on a company website is vital. Visitors to a website have already expressed an interest in a company by clicking through and this is an opportunity to develop that interest further. Following the same principle, any other properties where newsletter or SMS sign up can be promoted should be taken advantage of.

Consider having a sign-up form on your company blog, email signatures, Facebook page, and mobi site, or perhaps mention it during presentations you deliver. And don't forget other offline marketing channels that you're already using, such as flyers, posters or in-store displays. Many brands use competitions to encourage opt-ins as well. Remember, users are more likely to opt in with an email address than a mobile phone number on most channels.



Figure 18.4.1: An email newsletter sign-up all to action *Adapted From Screenshots, 2016*

Here are some best practice tips for sign-up forms:

- Put the sign-up form where it can be seen, above the fold and on every page.
- State your anti-spam stance explicitly, and be clear that you value subscribers' privacy.
- Clearly state what the subscriber's information will be used for.
- Use a clear call to action.
- Include a benefit statement. Tell subscribers what they will get, and how often they will get it.
- Ensure the email address or phone number is correct by checking the syntax.
- Test to see what works best!

Every interaction can be used to ask permission to send marketing material, though some work better for email than mobile.

- Offer something valuable, and ask them to sign up to your email newsletter at the same time, for example, white paper, gift voucher, music track.
- Add a newsletter subscribe box to the checkout process of your retail site.
- Use interactions at trade shows to ask for email addresses and possibly phone numbers.
- Ask for email addresses or phone numbers in-store.
- Call out your email campaign on your social networks, and link through to your subscription form.
- Users will often submit their phone number and email address to enter a competition.

Designing an email

Emails should be created and viewed as HTML for desktop and most mobile devices. Simpler phones require basic text emails. Be sure to check your audience's preferred devices carefully, as cheaper smartphones are becoming available, which increases their penetration into lower-income areas.

Text emails are the small, plain ones; text only, as the name suggests. If you use a Windows Operating System, and you open Notepad and type there, you will be creating a text file. As these are text only, the copy really counts here.

HTML emails are the emails with more complex design. These emails can contain images, different fonts and hyperlinks. They're probably what you've had in mind throughout this chapter when we referred to email marketing.

Parts of an email

Note

Refer to the images of the full newsletter later in this chapter to see how these elements look in context.

Sender information

This includes the ‘to’, ‘from’ and ‘reply to’ fields. These are opportunities to build a relationship through creating a perception of familiarity. In other words, the reader needs to perceive that the newsletter is somewhat unique and sent personally by the publisher. Using a personalised company email address, for example, trevor@ company.com, for the ‘reply’ field creates familiarity and builds trust with the reader provided the name is recognisable. Otherwise, using the brand name is fine. The ‘from’ address should also include the organisation’s name. A meaningless ‘from’ address that the reader cannot identify serves only to confuse the origin of the newsletter.

Subject line



Figure 18.4.2: Sender information and a subject line on an email *Adapted From Screenshots, 2016*

The subject line may be the most important part of an email! Subject lines help the reader to identify the email and entice them to open it. The subject line is also scrutinised by spam filters, so you should avoid using unusual characters, for example, ‘#2$%&^^%###’ or ‘!!!!!’. Emojis such as smiley faces or hearts can sometimes work, you’d need to test to see what works for you.

Consistent subject lines using the name of the company and the newsletter edition can build familiarity and help readers to sort their inbox. Subject lines should also reflect the content of the email. As with everything online, testing different subject lines will lead marketers to the formula that works for them. Some brands have found that using emojis can improve open rates, while others have had no success with them, for example.

Preheader

The preheader is a line or two of text displayed above your email header. Most commonly, it’s the line of text that will redirect you to ‘View online’. Where possible, try including your call to action in the preheader. This could be difficult, given the limited space but it does ensure that every recipient, even those who don’t necessarily open the email, but who view only the preheader within the preview pane or inbox, will still be exposed to it.



Figure 18.4.3: An email preheader *Adapted From Screenshots, 2016*

Header

The header is the colourful banner or image that is included in many emails. This often contains the logo, which is important for branding, as well as a CTA or image to catch the recipient’s attention. Not every email will have a header, but these do provide added impact.



Figure \({18{.}4{.}\eatSpaces{4} \endSpaces}: An email header *Adapted From Screenshots, 2016*

Personalised greeting

With a database that has the capability to store readers' names, it is possible to personalise the greeting of the email. "Hi, Kim Morgan" can elicit far better responses than "Dear Valued Customer", but it is possible to create a greeting with personality without personalising it. Occasionally, the subject line can be personalised as well to boost responses.



Figure 18.4.5: A personalised email greeting *Adapted From Screenshots, 2016*

Body

This is where the content of the email goes. Don't be tempted to use too many images; they can increase the size of the email, and obscure text when images do not load. Be sure that text can be read without an image being loaded. The structure must allow readers to scan and navigate the email easily. Short paragraphs, emphasis through bolding and colours, as well as sectioning information with bullets and borders all contribute to a well-structured email.

Footer

A standard footer for emails helps to build consistency, and is the customary place to keep the contact details of the company sending the email. At the very least, this should include the name, physical address and contact email of the company. It can also include the privacy policy of the sender or even extra copy to reinforce branding. One way to grow the email list is to add a 'forward to a friend' link in the footer or, more commonly, social media buttons. The most important part of the footer is a clear unsubscribe link.



Figure 18.4.6: An email footer with an unsubscribe link and social sharing buttons *Adapted From Screenshots, 2016*

Unsubscribe link

In many countries, it is mandatory to have an unsubscribe link on all commercial emails. In best practice terms, you should also include a link for managing subscription preferences – this lets the receiver decide exactly which emails they receive from you, rather than opting them out from all of your email marketing.

Working with templates

> **Note**
>
> Read more about this in the User experience design chapter.

An email template is a predesigned structure you can use for each email you send; you just need to slot content into the appropriate sections. Some email service providers offer ready-made templates for you to use. As with website templates, paid-for email templates come with some benefits and disadvantages. While they are often cheaper than commissioning a custom template, they can be inflexible and generic, meaning that they will not uniquely represent your brand. If you are choosing a template to buy, consider picking the plainest one, so that you can adapt it to your brand as needed.

> Note
>
> Take a look here for some free email templates as a place to get started: https:// www.campaignmonitor. com/email-templates/

A custom-designed email template will allow you to plan your own content structure and ensure it displays well across many email readers and devices.

When having your template designed, it's important to test it with a number of email readers, browsers and mobile devices so that you can ensure that it displays correctly. This can become challenging as some users still use preview panes to read their email.

Design considerations

How an email looks is integral to how well it is received by your database. Design also refers to how it is built, which can impact whether the email is delivered and how likely users are to interact with it. Some design considerations are included below. A few of these are a little more technical, so make sure that your email partner has these covered for you.

The look and feel

Studies have found that users read or scan emails following an F-shape (Nielsen, 2006). A follow-up study by the German Research Center for Artificial Intelligence looked at how users read text on smartphones, testing different layouts and paragraph lengths, and found that the F-shape still applies (Biedert, Dengel, Buscher, and Vartan, 2012). So, plan your important information to follow this flow.



Figure 18.4.7: Online, users tend to read in an F-shape *Adapted From Nielsen, 2006*

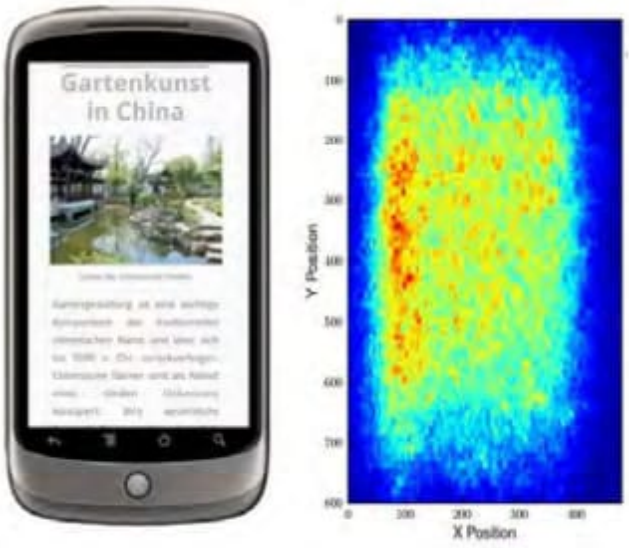


Figure 18.4.8: The F-shape still applies on smartphones, with the left-hand side of the screen dominating patterns *Adapted From Write Clearly, 2016*

Cluttered inboxes and busy subscribers mean an email that's lengthy and difficult to get through probably won't be read. Help your subscribers by structuring your email content into segments, making use of borders or colour blocks to accentuate and divide content. It's important to balance image and text in your emails. Make a point of placing images next to the relevant text.

General design guidelines

> **Note**
>
> Read more about this in the Web development and design chapter.

HTML and CSS design principles differ for web and email. Here are a few things to keep in mind when designing your email:

- Don't make use of external or embedded style sheets and avoid unnecessary embedded rows and columns.
- Make use of table nesting as far as possible, as this is generally considered to render the best results with difficult email clients. Email designers tend to make use of tables to design their email layout, using inline styles within these tables.
- Set a fixed width for your email by specifying the width and spacing of each cell rather than the entire table. When these specifics are not declared, email clients tend to render the email according to their own defaults and can break the design.

> **Note**
>
> Naturally, your email design should echo your overall corporate identity and personality

- If you are using a block background colour, be sure to include a 100% width table to cover the entire email.
- Keep fonts in your email design larger than 16px. Anything below that becomes difficult to view in mobile. Also bear in mind that, while coloured text (or light-on-dark text) may look visually impressive, it can be difficult to read an entire email like this and may strain your subscribers' eyes. Rather limit such visual tricks to smaller sections of your email, or to emails that contain less written content. • Make use of inline CSS. Some email clients strip the CSS from the head and body of the email.
- Test your emails in a variety of email clients before you send.
- Use responsive design!

Designing for the preview pane

Many email users still use desktop clients to manage their email. Given the number of emails users receive on a daily basis, many

still prefer to view emails in their preview panes rather than opening them. This has added another challenge for designers who want to ensure that their emails display properly.

Images and layout should consider the preview pane and be tested for rendering. Preview panes can be vertical or horizontal.

Tips for designing for the preview pane:

- There is no set width, and we reiterate that testing is the way to go. A width of 600px works best for preview pane display (HubSpot, 2016).
- Ensure that plain, email-friendly fonts are used toward the top of your email in order to ensure that the first text encountered is properly displayed.
- Consider carefully what images you display in the top section of your email, and test displays accordingly.
- Placing your logo prominently in the top left of your email can ensure optimal brand recognition and exposure.
- Try to include your call to action in the area displayed in the preview pane. That way, even if subscribers choose not to read your email, they'll still see your primary message.
- Some successful email templates use the area likely to be seen in the preview pane to provide a table of contents for the email. Users know what they can look forward to when opening the email.

Email and images

Avoid using images to convey important content. Make sure that there is alt text for all images used in the email. This ensures that the message of the image will still be communicated even if the image itself is not seen. Even though most email clients display images by default, some users may still not see them. Your email should make sense whether or not the user can see images.

> **Note**
>
> The images you use in the email should support the overall message, rather than convey it directly. If the image doesn't appear, the message should still be clear.

Tips for using images in email design:

- In the past, background images did not render well in emails, but this is changing. A block background colour tends to display well across most email clients. Some email clients, like Outlook, still do not display background images.
- When including images in your HTML, be sure to declare the height and width for each image to ensure consistent rendering across most email clients.

Emails that make sense without images and render correctly across all platforms are more likely to persuade a reader to open the email and click through to the website.

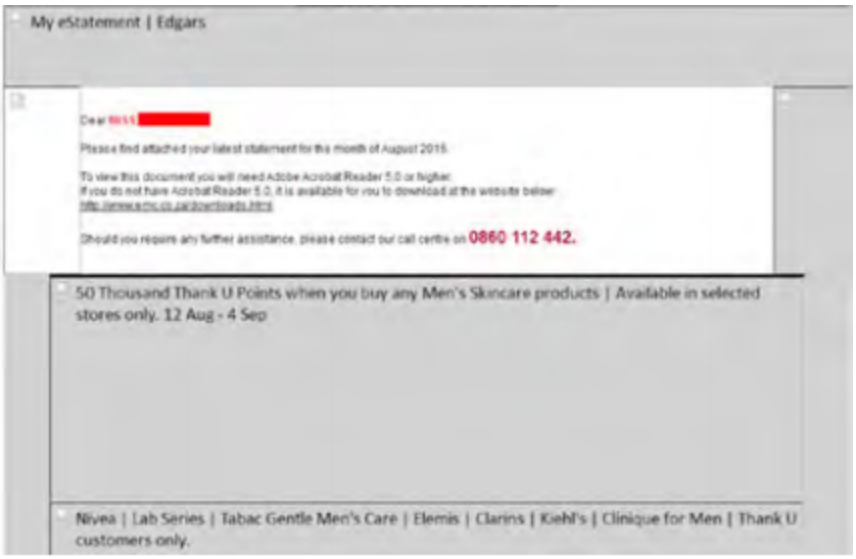


Figure 18.4.9: Good use of clear image alt tags in an email newsletter *Adapted From Screenshot, 2016*

The call to action

Email design should support the calls to action. For your campaign to be effective, your goals and KPIs should be supported by the email layout and design. Calls to action can be hyperlinked text (also called text links), or can be images which look like buttons. Don't forget though, that if images are blocked, your buttons will be blocked too.

> **Note**
>
> Check out this article for examples of good email CTAs. www. campaignmonitor. com/blog/emailmarketing/2016/03/75- call-to-actions-to-usein-email-marketingcampaigns

Generally, both text links and CTA buttons are effective for generating clickthroughs, though some studies find that buttons perform better. While you should use buttons for links that support your CTA, for example, 'make a booking', 'check availability', your email shouldn't be littered with them, and hyperlinks should be used for additional links. You should test them to see what kinds of CTAs perform best for you.

The copy of the CTA is exceptionally important: a well-crafted and enticingly written CTA makes a big difference to the performance of your campaign. Again, test variations to determine what drives the highest clickthrough and conversion rates on your campaigns.

Testing

The design should be tested to ensure that it renders clearly in as many clients as possible. Make sure that images line up, that copy is clear and that all the links work.

SMS best practice

Structuring an SMS involves considerably fewer considerations than writing an email. Keep in mind:

- The core concern for SMS writing is that they are limited to 160 characters, which means the hardest part of writing one is finding a way to convey your core message with very limited space.
- Part of your SMS needs to be dedicated to offering an opt-out option so that users feel in control of the communications.
- Because the mobile phone is so personal, sending relevant, targeted SMS messages is imperative. Make sure that your mobile opt-in database is very carefully segmented; 200 subscribers who actually want to hear from you are far more valuable than 2 000 who feel annoyed or harassed by your messages.

- Think about when you send your messages, are they being sent at a time that is relevant to your customer? If you are sending a sales promotion message, are you sending it at 6 a.m. in the middle of the month, or at 10 a.m. on a weekend after payday?
- Make sure that if your SMS includes a next step such as clicking through to a website, the landing page is mobile-optimised.

SMS is often best used for customer relationship management, but you can also use it to send promotions targeted to a time of day when your customers are likely to be out shopping or aimed at specific demographics or geographic areas. Just remember, as with all direct marketing, these messages need to be relevant and valuable to your customer.

Creating content

Content that is relevant and valuable to readers is vital to ensuring the success of a direct marketing campaign. Valuable content is informative and should address the problems and needs of readers. It is important to realise that the reader determines the value of the content, not the publisher. Newsletters can offer:

- Humour
- Research
- Information
- Promotions
- Exclusive content.

SMS messages can offer:

- Special offers and discounts
- Information
- Time-dependent discounts
- Celebrations
- Contests
- Trivia or voting
- Reminders.

Determining the content of your direct marketing messages is an important element of your overall brand content strategy.

> **Note**
>
> Read more about this in the Content marketing strategy chapter

Any copy written for your brand should follow a predetermined brand voice guide. Consistency is important and will dictate how your customers trust and build a relationship with your brand.

The principles of writing good online copy apply. You should start with the most important information first, and make sure that your language is scannable, meaning that it makes use of the appropriate formatting, such as bolding and bulleted lists.

It may be helpful to review the Digital copywriting chapter at this stage, but there are two elements that are important to highlight now with respect to writing for direct marketing.

> **Note**
>
> Read more about this in the Digital copywriting chapter.

1. The first is in-message links. It's important to consider that any links you include in your email copy will lead readers away from your email. You'll want to keep these to a minimum, and include a link only when it is a call to action, a legal requirement or a service feature. Links in SMS messages should be shortened with a URL shortener like Bitly and should lead to a mobileoptimised page.
2. The second element is, for email, the all-important subject line. Many users decide whether or not to open an email based on their first point of contact: the subject line.

For an email newsletter, it's useful to put together a recurring content structure. The example shown here depicts a consistent content structure with repeating elements.



Figure 18.4.10: Two editions of a newsletter, showing a similar structure *Adapted From Screenshot, 2016*

Note

Note how the same elements recur for every newsletter, creating consistency and delivering on reader expectations.

If your newsletter contains a lot of content, you can use enticing snippets with a link to the full article displayed elsewhere, such as in your company blog. Sending out too much long content in your newsletter can be daunting for time-starved readers and they may not make it all the way through your newsletter.

However, if your newsletter consists of only one article, it may help to publish it in full.

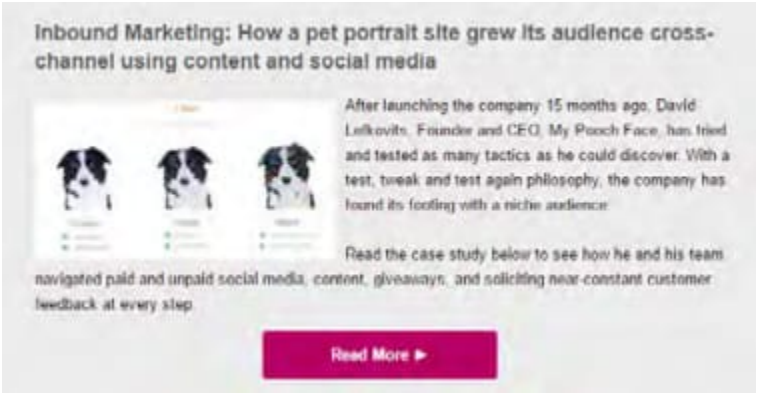


Figure 18.4.11: An article snippet in an email newsletter *Adapted From Screenshot, 2016*

Content in an SMS obviously needs to be more concise. You should get to the point as fast as possible, which can mean including price points so that users know immediately if they are interested. Remember to include an opt-out option.



Figure 18.4.12: SMS marketing examples *Adapted From Screenshot, 2016*

Segmenting your database

The technology of direct marketing allows for mass customisation; it is one-to-one marketing on a macro scale. Even simple personalisation can see improved results.

Customisation covers everything from using the recipient's name, to sending the correct email version to their device, to sophisticated measurement of a recipient's preferences and tailoring content to suit them. This is even more important for SMS marketing, where content that doesn't interest the reader can actively damage their relationship with your brand.

Segmenting a database can allow for customisation across demographics or purchase history. For example, you may choose to divide your database according to gender or age. A political campaign may benefit from targeting slightly different messages to different demographics. A pet store may find it useful to segment their list according to the different kinds of pets their customers own. In this way, it is possible to send messages that are slightly different and tweaked to different target groups.

> **Note**
>
> Other options include segmenting by location, user behaviour on site, or position in the sales funnel, for example, potential or existing customers.

Deploying

By creating valuable content, establishing the correct frequency and testing your messages for display and deliverability, an email marketer should be able to ensure an excellent delivery rate. Consistency in deploying newsletters also aids in fostering trust and fulfilling expectations.

When should you send emails? Common sense tells you not on Monday morning or Friday afternoon, but this varies by audience. Testing will guide you. Generally speaking, the best days of the week to send emails are between Tuesday and Thursday. SMS messages need to be timed even better, given that they will be delivered immediately to a device the consumer is carrying with them. Best times for delivery will vary depending on type, according to SMS Global (2016).

- General marketing messages should be sent between 10:30 and 11:30 a.m or 2:30-3:30 p.m.
- Appointment reminders should be sent 24 hours and/or directly after the appointment is made.
- Weekend sales and special events reminders should be sent on Thursdays or on the morning of the event. As always, of course, you need to test send times to check which works best for your customers.

Sender reputation

Email reputation is a score given to you depending on how well your emails are regarded by Internet Service Providers (ISPs) and your subscribers. If the sender's score falls within the ISP's thresholds, a sender's messages will be delivered. If not, the sender's emails may arrive in the bulk or spam folder, be quarantined, or be bounced back to the sender.

How it works: There are various authentication systems that can impact your reputation score. One of these is the Domain Keys Identified Mail (DKIM) and Domain Name System (DNS). DKIM associates domain names with individual email addresses, ensuring that each organisation has to take responsibility for emails sent that are associated with their domain. Basically, DKIM signs out any outbound emails.

The DKIM signature is added to the email header and includes an encrypted code. The receiving mail server will then take that DKIM signature and verify it with the DNS system to find the matching DKIM public key. Once it has this key, it can use it to unlock the encrypted code. If the code hasn't been changed, the email hasn't been tampered with, which means it can be authenticated and passed into the receiving mail server.

Becoming an effective email marketer requires constant list cleansing and hygiene. In fact, most lists shrink by about 22% each year as a result of subscribers changing email addresses (HubSpot, n.d.). Build a preference centre and send out an email once a year asking subscribers to update their details. Make sure you are diligent about maintaining a current opt-in list to achieve maximum deliverability via reputation.

Tips to help your reputation score:

- ISPs offer various authentication standards such as Sender ID, sender policy framework (SPF), and DomainKeys. We highly recommend the use of these standards.
- Remember that a huge but inaccurate and outdated database is far less useful to an email marketer than a tightly maintained, smaller database. Strive to boost your database, but don't forget to clean as you go.
- Ensure that email broadcast rates are not too high.
- Respond to complaints and unsubscribe requests, if someone requests to be unsubscribed, do so. If you don't, there's a good chance you'll face stiff penalties.
- Educate users about white lists.

An email's reputation score can be checked at www.senderscore.org.

If the recipient has given permission to be sent marketing messages by email, then it is not spam. Users give permission when they tick a box that says, "Yes, please send me offers from your company by email/phone". The email address can be provided to another company only if the user ticks a box that says, "Yes, please send me offers by email from third parties selected by you".

Note

The success of your direct marketing relies on users explicitly indicating that they want to hear from you. Don't break your customer's trust.

Permission for any kind of direct marketing must be explicitly given to the company. Trying to gain permission in a sneaky way is illegal and should never be done.

An email's spam score can be checked at spamassassin.apache.org.

SMS credibility

Reputation via SMS is just as important; consumers are becoming increasingly suspicious of marketing messages in general, so reputation is important to convince the customer even to take your message seriously.

To make sure your SMS is credible, you'll need to pay attention to how it's written, the message itself, the words you use, and so on. Time of delivery is also important, as is branding the message so that your customer knows who it's from. Remember the key: send users only what they want, when they want it, and you'll be trusted.

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18.5: Measuring success

As with all things digital marketing, tracking, analysing and optimising are key to growth and success. Most direct messaging tracking systems produce statistics in a user-friendly manner.

Key measurables for understanding the performance of direct marketing campaigns include:

- Number of emails or SMSs delivered (delivery rate).
- Number of bounces (this should be separated into hard bounces and soft bounces).
- Number of unique opens: a message can be delivered, but not opened.
- Unsubscribes: significant or consistent loss in subscribers is a key indication you are not meeting the needs of your subscribers.
- Pass-on rate: a high pass-on rate (forwards) indicates that your customers value the content enough to share it constantly with others. Adding a signup link to forwarded emails will organically grow the opt-in list.
- Clickthrough rates and conversion: These measure the effectiveness of a message via the links placed in the content. When a reader clicks through to a web page, these can be easily measured as a percentage against the number of delivered, opened or sent emails. It reveals which content or promotion was the most enticing for the reader.

Some metrics are more useful than others. A good example of this is the open rate. Emails are tracked using a tiny, transparent image that gets downloaded, but some email desktop clients block the downloading of images. If the tracking image doesn't load, the email won't register as opened. However, this can be factored in to some extent, and open rates give you an idea of how well your subject lines resonate.

What you should be interested in is what activity takes place based on a message. This means you'll need to track leads or actions. You can do this through link tagging, meaning appending tracking parameters to a URL in your newsletter or SMS. These parameters are then identified by the Google Analytics of your website, registering that the user has come to the site through your email or SMS. Google Analytics will then take the information in the tag and store it in a cookie, from which it can track the user's interactions with the site after they arrived at the landing page.

Here is a link to the Mobile Marketing Watch website as it may appear in a Mobile Marketing Watch email campaign:

http://mobilemarketingwatch.com/
urba...ns-69570/?utm_source=feedburner&utm_medium=email&utm_campaign=Feed%3A+MobileMarketingWatch+%28Mobile+

The tracking parameters are:

?utm_source=feedburner&utm_medium=email&utm_campaign=Feed%3A+MobileMarketingWatch+%28Mobile+Marketing+Watc

These can then be used to report on traffic from that message using Google Analytics.

Generic direct messaging benchmarks can be used as a guide to see how well your campaigns are performing, but the best way to monitor performance is to benchmark your own campaign. Smaller lists tend to have a higher open rate, but this is probably because they're more targeted. The overall average email open rate is 27.4%, though this varies by industry, while the average clickthrough rate is 4.5%. Overall rates are quite low because far too many ignorant or lazy email marketers bring down the average. It's best to look at the average open rate for your industry, rather than the overall rates. You can do this by checking the Email Stat Centre website (EmailStatCenter, n.d.).

The overall SMS open rate is harder to determine. Many reports put it at between 82% and 98%, but this is difficult to ascertain. The average clickthrough rate varies by source but is generally far higher than for email, at anywhere between 6% and 19% with overall response rates at above 30% (Tatango, 2016; Apifonica, 2016).

Once the reports have been generated, it is time to work out what the numbers are revealing, and then use this information to improve the next message sent out.

To make sure that your email marketing efforts are continually improving, it's important to test your campaigns. The most common form of direct marketing testing is to conduct an A/B split test. This is a test that involves sending one version of your newsletter or SMS to a specified percentage of your database, while sending a modified version to the remainder of your database. Some

factors to test include:

- Open and response rates across different subject lines, calls to action, and delivery times.
- Optimal number of links in an email for clickthrough rates and conversions.
- Different copy styles and copy length.
- The effect of video on delivery rates, open rates and conversions for email and MMS.
- Balance of text and image ratio.

By monitoring the results of each send, you can determine which version yielded the desired results. You can, for instance, test variations of your call to action to determine which is more effective in persuading subscribers to click through.

Examples of what to test:

- Subject lines (for email)
- Send times
- Best day to send
- Layout
- Text vs. button links
- Database segmentation
- Call to Action
- Copy differences (for SMS).

Testing and monitoring your send statistics go hand in hand. It's important to analyse your results after sending to ensure you're implementing the most effective strategies for your database.

Useful KPIs include:

- Open rate
- Clickthrough rate
- Number of emails forwarded
- ROI
- Number of social shares
- Database growth
- Conversion rate (activity on your site generated by the email)
- Delivery or bounce rate.

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18.6: Tools of the trade

There are many good ESPs available. MailChimp (www.mailchimp.com) is one example of an email service provider that can manage the email send for you from start to finish. It provides tracking, support, subscriber list management and email templates.

More advanced ESPs that offer a range of message and campaign management facilities, as well as broader data management and delivery value, include Salesforce Marketing Cloud (www.marketingcloud.com), Silverpop (www.silverpop.com), Hubbion (hubbion.com) and Oracle Responsys (www.oracle.com/marketingcloud/ products/cross-channel-orchestration/index.html), which offer mobile and email solutions, among others.

All emails need to be tested for email client compatibility as well as for any potential spam problems.

- For email client compatibility, as well as mobile rendering, you can test your email at Litmus: litmus.com/email-testing or at PutsMail: putsmail.com
- An email's spam score can be checked at: spamassassin.apache.org
- An email's reputation score can be checked at: www.senderscore.org.

Once a message has been sent, results need to be analysed to pinpoint areas for growth for the next campaign. Use your ESP's built-in analytics feature and correlate this with your Google Analytics data.

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18.8: Advantages and challenges

Permission-based direct marketing can give the highest return on investment of any marketing activities. Technology allows mass customisation, allowing personalisation across a large list of subscribers. When used to foster relationships with a customer base, direct marketing can go a long way to increasing the lifetime value of that customer.

Direct marketing is highly measurable, and databases are able to be easily and thoroughly segmented. However, with the increasing numbers of companies and individuals using email and SMS marketing, many consumers are fatigued. It requires ingenuity, focus and dedication to maintain a direct marketing database and consistently deliver useful quality messages that will be read.

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18.9: Case study - GlobalGiving

One-line summary

GlobalGiving website increased engagement by 10× using personalised email.

The challenge

GlobalGiving is a charity crowdfunding website that provides social entrepreneurs and non-profits the chance to raise money for community causes worldwide.

GlobalGiving sends more than 3.5 million emails per year, but they were getting decreasing marginal returns from each send, finding it more and more difficult to catch the attention of donors due to email fatigue. (Source: Marketing Sherpa, 2016)

The solution

The brand decided to personalise and customise content and make sure it was getting to the right people.

They worked with an ESP to make sure their emails were certified and created an entirely opt-in email list. Using tracking, they identified a handful of domains and sub-segments of donors that were reporting abnormally high spam rates, which they decided was due to regional differences - their campaigns worked well in the United States, but not in each of the 180 countries to which they send emails. For example, non-English-speaking countries reported higher spam rates. They suppressed these domains from their list and automatically unsubscribed anyone who reported an email as spam.

Next, they created a personalised recommendation email using a recommendation engine similar to Netflix, but which looks at users' past giving habits rather than their watching habits, and used that along with a matching offer and a time-bound appeal for users to donate by a certain deadline.

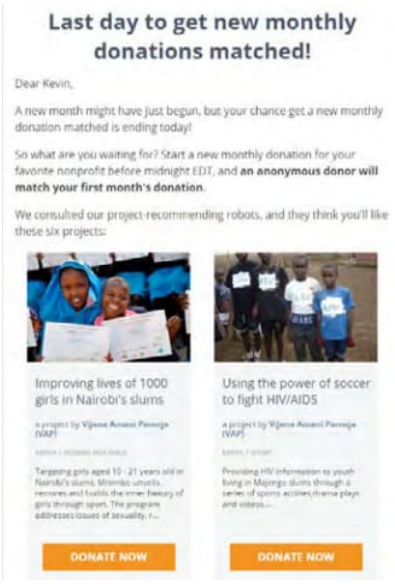


Figure 18.9.1: GlobalGiving personalised email *Adapted From Marketing Sherpa, 2016*

They followed this with constant A/B split testing to ensure that their recommendation engine was working. They also tested subject lines, content, appeals, and more.

The results

The team saw a tenfold increase in engagement from email.

- Their recommendation emails dramatically outperformed the emails that sent random projects to donors.
- When factoring in the donor's giving history, using projects they had supported in the past, they saw a 20% boost in engagement as well.

They also created an email program that is carefully set up to improve the brand's reputation in the long term.

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18.10: The bigger picture

While direct marketing can operate as a stand-alone marketing campaign, integrating it with other channels, both online and offline will serve to reinforce the brand's message and increase responses.

There should never be a disparity between the content, tone or design of an email or SMS when compared to the rest of a company's offerings. In-store promotions can be reinforced and promoted to a direct marketing database, or website information can be summarised for email or SMS.

Custom landing pages, if required, should be created for any promotions being communicated by email. For the most part, marketing messages should aim to get the customer to the site; landing pages are therefore essential. They need to be optimised to close the call to action. So the message gets the subscriber onto the page and the landing page gets them to sign up, buy, or engage. The idea is to create a flow between the two that brings the 'selling' process full circle, whether it's actually buying something or just reading through the content to engage them with the brand.

Direct marketing and social media work very well together for cross-channel promotion. Where email and SMS can create a one-on-one feel between a brand and an individual, social media can move that attention towards a sense of community and keep your consumer involved in a dialogue.

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18.E: Direct marketing - email and mobile(Exercises)

Case study questions

1. Which elements of GlobalGiving's email marketing constitute best practice?
2. What role did the database play in this example? Why was it so important?
3. Explain how personalisation played a role in the campaign.

Chapter questions

1. What is meant by 'mass customisation' and why is this so beneficial?
2. What are the key differences between direct marketing by email or SMS and direct marketing by post?
3. Why is it important for permission to be gained before marketing by email or mobile to a prospect?
4. Emails that are expected and recognised are more likely to be read. How can a marketer use this knowledge to increase the readership of emails?

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18.S: Direct marketing - email and mobile

Direct marketing can deliver the best ROI of any digital marketing tactic. It is:

- Highly targeted and customisable
- Cost effective
- Easy to set up, test, and track.

Gaining explicit permission to send marketing messages to a person is an essential prerequisite for successful direct marketing. Once you have this permission, all messages sent by an organisation and the individuals in that organisation can be seen as marketing opportunities.

Successful direct marketing requires careful planning and testing. HTML emails need to be tested across a range of email clients, and should be tested for a spam score before being deployed. All messages sent to a list of subscribers needs to provide an easy and accessible unsubscribe option. Make sure you adhere to your local regulations for direct marketing.

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19: RETAIN - VIDEO MARKETING

Learning Objectives

In this chapter, you will learn:

- Why video marketing is such a powerful, versatile and effective marketing channel online.
- How successful online videos are produced, step-by-step.
- Paid, earned and owned methods of promoting your online video.

19.1: Introduction

19.2: Key terms and concepts

19.3: Video content strategy

19.4: Video production step-by-step

19.5: Video promotion

19.6: Facebook Video

19.7: Case study - Nike Chicago Cubs Someday

19.8: The bigger picture

19.9: References

19.10: Advantages and challenges

19.11: Measuring Success

19.12: Tools of the trade

19.E: Video Marketing(Exercises)

19.S: Video Marketing(Summary)

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19.1: Introduction

Video offers an extremely rich, engaging and stimulating experience for viewers. With the increased availability of bandwidth and improvements in video technology, people have started watching and sharing videos on a scale never seen before. From music videos to funny clips of animals to reviews, how-tos, exciting commercials, and movie trailers, users are turning to video for entertainment, information, and education.

According to HubSpot (2016), the most popular forms of online video content are:

- Comedy (39% of users)
- Music (31%)
- News (33%).

In September 2017, Google was the world's largest desktop search engine, with a 91% global market share (Statcounter, 2017). Arguably the second largest search engine was YouTube, the popular video-sharing website (and third most visited website on the web). YouTube boasts over 1 billion unique users (YouTube, 2017). This indicates that users are turning to YouTube with precise, intent-driven behaviour, they're not just browsing randomly or waiting for a link to land in their inbox.

With more and more users using search engines to find video content, understanding how to create and optimise videos for search is an important part of any digital strategy.

Every day, about 1 billion hours of video are watched on YouTube, more than half of which come from mobile devices, while every minute, 400 hours of video are uploaded (Expanded Ramblings, 2017). Other social media sites are getting in on the video action as well. By the end of 2016, Facebook was responsible for more than 3.8 billion video views per day, though there is a little uncertainty about what counts as a video view. Videos uploaded directly to Facebook have ten times more reach than shared YouTube links (Mediakix, 2017; Adelie Studios, 2016).

The introduction of live video such as Facebook Live and Periscope has also changed the video game – users spend three times longer, in total, watching Facebook Live video than they do pre-recorded video (Hootsuite, 2017).

Videos can come from anyone, and from anywhere. Small videos can experience massive global reach, as was the case with the popular Charlie Bit My Finger video, which had accumulated more than 854 million views as of October 2017.

Brands use video-sharing platforms to connect with their customers, who are increasingly interacting with brands by creating opinion videos, parodies and responses. Individuals have the power to market themselves, their ideas, who they are and what they do. Video content helps you connect with your audience, creating an experience and encouraging engagement.

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19.2: Key terms and concepts

Table 19.2.1

Term	Definition
Annotation	A comment or instruction usually added as text, on a YouTube video. A YouTube annotation may contain links directing users to other pages within YouTube or, if a brand is willing to pay, to outside websites. These have been phased out as of 2017 and replaced with video cards.
Captions	Text that appears over a video that labels a scene, identifies a location or person, or narrates dialogue onscreen. Captions can be either open or closed.
Embedding	Taking video from an online video provider and posting it elsewhere on the web.
Google AdWords	Google's search advertising program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
Metadata	Information that can be entered about a web page and the elements on it to provide context and relevance information to search engines.
Search engine results page (SERP)	The actual results returned to the user based on a search query.
Thumbnail	The small, still image that is shown at the start of the video. This can be selected, and can make a video more enticing.
Video cards	Calls to action that pop up during a video and entice certain actions from viewers. Replaced annotations in 2017.
Video search engine optimisation (VSEO)	Optimising videos for search engines, similar to the way in which one would optimise a website to rank higher on the SERPs.
Video syndication	The process of distributing and getting search coverage for videos
Views	The number of times a video has been seen. Multiple views can come from one user.
Viral video	A video that becomes immensely popular, leading to its spread through word of mouth on the Internet via email, sharing on social networks, and other hosting websites.
Vlogger	Video blogger. A person who produces regular web videos about a chosen topic on a video-enabled blog.

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19.3: Video content strategy

Videos are powerful because they can have a strong emotional effect on viewers. It's no secret that funny, shocking, amazing, and inspirational videos do particularly well online. Video is the ideal tool for experiential marketing giving viewers the chance to experience something alongside the onscreen actors and to consider how they would feel or act in that situation. It also helps to show off a brand's personality, tone and communication style.

Video content is a necessary part of the digital marketing mix. Dr James McQuivey famously exaggerated that, "Video is worth 1.8 million words" but exaggeration or not, video is more engaging than any other form of content.

- Video on social media generates 1 200% more shares than text and images combined (WordStream, 2017).
- Companies using video have 41% more web traffic from search and video can cause a 157% increase in organic traffic from search engines (Brightcove, 2016).
- Video on a landing page can increase conversions by 80% or more. (Wordstream, 2017).
- Businesses using video grow revenue 49% faster year-on-year than those that don't use it (WordStream, 2017).
- 59% of company decision makers prefer to watch a video than read an article about a product (Forbes, 2017).

Many people are still under the misconception that online videos are expensive and difficult to produce. That's not necessarily the case. While the most popular videos are professionally produced - for example, the Despacito music video has accrued around 4 billion views - the many millions of successful home video bloggers (vloggers) and marketers prove that low-cost videos can still make an impact.

Unlike content made for TV, web video content can be filmed at a much lower cost and quality, using readily available home video equipment. Affordable high-quality cameras have made quality content production a reality for everyone. Viewers don't necessarily expect a super-slick offering (though even this is possible with some basic video editing software). To get started with making video marketing content, you will need:

A camera: Depending on what you can afford, this can range from a simple webcam or your mobile phone's camera to a (top-of-the-line) professional camera, though there are many excellent mid-range options available at a low price.

A microphone: While some cameras have a built-in microphone, its worthwhile investing in a proper mic to ensure that you capture better sound quality as builtin microphones tend to catch a lot of background noise at the expense of the main audio.

Video editing software: You will need a software package to cut, edit and finish your video; there are a wide range of options, including free built-in software (Movie Maker for Windows and iMovie for Mac) and professional video editing suites (such as Final Cut Pro or Adobe After Effects), which can be more costly. YouTube also offers an online video editing tool, and you can take a look at some of the available apps like Filmmaker Pro, ProMovie Recorder, and Adobe Premiere Clip.

> Note
>
> There are many useful, free resources and tutorials on creating videos online, www.wikihow.com is a good place to start looking.

Video content versus video ads

Video marketing covers two approaches.

1. Video content: These are videos made to entertain, inform, share updates or otherwise enlighten or delight the viewer. Much like syndicated articles or blog posts, these are usually not directly promotional, but instead provide shareable content that gives value to the viewer. Some examples of video content include:

- How-to guides, tutorials, and explainer videos
- Conference talks
- Video presentations where video should be used to:

    - Inspire, move people and connect with them emotionally
    - Educate in a fun, informative, and entertaining way
    - Reveal the unexpected
- Valuable industry updates

> **Note**
>
> Think about it now, if your company or brand wanted to create content videos, what format and approach would you use?

- Educational lectures
- Product reviews and advice
- Entertainment.

2. Video ads: These are simply adverts that are filmed and formatted for online use. These can be existing TV commercials that are shared online, or custom ads made specifically for the web. Statistics about video consumption make a compelling argument for the latter over the former. We'll cover a range of options for posting your video ads below, in the section on paid video promotion.

Is it possible to go viral?

The Holy Grail of video marketing and, in fact, any marketing on the web, is word of mouth - having a piece of content 'go viral'. This means that the content spreads from person to person through the web at a very high rate, attracting an exponentially growing audience as it gains popularity. The key to this viral effect is social media, where each user is connected to a wide network of others and can easily share content with their friends. Because this is a trusted social referral, it's more likely that they will view and share it themselves, if it's good enough.



Figure 19.3.1: A screenshot of the most popular Will It Blend video on YouTube indicating the number of times it has been viewed *Adapted From Screenshot, Blendtec, YouTube, 2017*

Nobody quite knows the secret recipe for getting content to go viral, and quite possibly there isn't one; the sheer variety and scope of viral videos shows that almost anything might catch the interest of the Internet on the right day. This means that it's very difficult to craft a video in order to make it go viral. Instead, focus on making great content that you and your audience will love and that speaks to their wants and needs and then, if you're lucky and your stars align just right, your video might go viral.

- **Address a currently trending topic.** Find something that users are already excited about or interested in, and see how you can contribute meaningfully to the conversation. For example, make your own edited version of a viral video.
- **Make it enticing.** Craft the video's description, title and thumbnail so that they draw attention.

- **Make it remarkable.** Whether it's funny, astonishing, scary, shocking or informational, your content has to have value for your viewers and it has to give them social capital for spreading it.
- **Make it unique.** The Internet loves new, fresh, crazy ideas so don't rehash somebody else's success or stick to a formula. Be truly creative and inventive.
- **Make it shareable.** Include the tools and incentives to make your video easy to share; consider social media chiclets, video cards, encouraging comments and more.
- **Make it short.** With very few exceptions, successful viral videos tend to be short, impactful clips. Users have short attention spans. You lose around 30% of your audience in the first two minutes, with a sharp drop off between 2 and 6 minutes, so make sure you get the message across quickly (Wistia, 2016).

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19.4: Video production step-by-step

Creating video content for the web can be easy and cost effective but it will always involve a lot of research, thought, and planning before you even get started with filming. Consider the following process:

Identifying your audience

As always, you first need to identify the audience for whom you are creating this video content. What are their wants and needs? What video content are they already consuming? Where are they consuming it? How can you engage their attention, provide something valuable that fits the platform, and promote your brand at the same time? Some solid market research will reveal the answers to these questions.

Planning and concept

Now you need to come up with the core concept for the video, which will be dictated by what will resonate with your target audience. Will it be a once-off clip or part of an ongoing series? What marketing message do you hope to convey? Decide on the best style and tone in which to convey this. What kind of story do you want to tell? Remember, storytelling is central to a good video, whether it covers B2B or B2C content.

Once you have decided these aspects, it's time to start planning your actual video shoot. You will need to write a script, or at least prepare a breakdown of what the video should include, and schedule the shoot, consider the venue, crew required, actors, and any other props or elements you will need. How long this takes will depend on the complexity of the video you're planning and your budget.

Producing the video

> **Note**
>
> For some helpful pointers and advice on producing your video, take a look at the Vimeo School: vimeo. com/videoschool

Now it's time to get filming! Once you have all the footage and audio, edit it together, add any special effects and other elements, and save it as the final video.

Choosing and uploading to platform

Once you have the video, you need to decide where it will be uploaded to. There are two options for making your video content available online. These are not mutually exclusive and there are techniques for both to ensure the best distribution and search coverage for your video. For example, you could be embedding videos posted elsewhere on your site or on social media, which is where a massive amount of video is being consumed.

Online video can be hosted on your own site, or it can be posted to one or many video distribution channels. If you post your video somewhere such as YouTube or Vimeo, it is then easy to embed it into your website as well.

The main advantage of posting a video to a third-party site is the opportunity to quickly exploit an already existing audience. These websites also usually have a built-in social and viral media aspect to their user experience. Video-sharing sites tend to have simplified algorithms which are easier to take advantage of, leading to more rapid universal search exposure.

Many third-party video hosting options exist. Short-form videos like Vine, Instagram, and Snapchat have emerged to challenge existing heavyweights like YouTube (www. youtube.com) and, increasingly, Facebook. It is difficult to know whether Facebook or YouTube receives more daily views because on YouTube, a view is longer than 30 seconds, while on Facebook a view is counted after three seconds. However, Facebook claims that users watch around 100 million hours of video every day, compared to

YouTube's claims of around 300 million hours a day (arguably up to 500 million by November 2016) (Moz, 2016).

Evan James from Socialbakers suggests that the key to deciding where to distribute your content is "[t]o understand what content works on which platform – how it works – and to build your strategy around using each network to its fullest potential" (HubSpot, 2015). In other words, rather than placing your videos on the platform with the most views, you need to find out where your audience is consuming video, whichever platform that may be, make videos for those specific platforms, and post them appropriately.

Many channels allow you to add a logo, branded elements, a brand description and links to your other web properties. This means you can customise the page as you see fit. Channels also have a range of analytical features for measuring video engagement, and as an added bonus, they work well on mobile devices, too. Using YouTube can help you gain many benefits in ranking well on the world's most popular search engine, Google.



Figure 19.4.1: The HBO channel on YouTube showing strong branding *Adapted From Screenshot, HBO, YouTube, 2017*

Other good options for video hosting include:

- Vimeo (www.vimeo.com)
- Metacafe (www.metacafe.com)
- Dailymotion (www.dailymotion.com).

If your video is hosted on your own website, the obvious advantage is that you have control over the whole website and environment in which it is hosted, from the look and feel to on-page text, metadata and user experience. When it comes to advertising and related content, you control both, and you decide how to monetise it. Traffic and links go directly to your website, and can therefore be integral to a longer-term search strategy. However, consider embedding your videos from your account on your chosen video-sharing site. Not only does this allow you to crosspollinate content, but you will also gain more views via more points of entry.

Note

YouTube Analytics lets you see where users are viewing your videos. This can give you insight into your most effective videosharing channels.

Optimising

At this point, you need to optimise your video for easy discovery on the web. Most searching on the web is keyword based. Users type keywords relevant to their query into a search box, and the results of the search should list content that matches the

keywords. Whether you are using a search box on a website, on YouTube, or Google, this outlines the very basic way in which we expect the search function to work.

The search engine tries to match your keywords to the content it has indexed, and is also trying to determine how to rank the results so that you get the most relevant content at the top of your search results page.

This is all covered in detail in the Search engine optimisation (SEO) chapter. Optimising video for search involves understanding the basics of SEO, as well as the particular challenges and tactics of optimising video content.

Search engines rely on being able to use text in the content to determine what it is about, and other indicators to determine how relevant that content is. When it comes to web pages, search engines can 'read' the text on the page to determine what the page is about, and can measure the links coming in to determine how relevant the page is. When it comes to video, the search engine cannot 'watch' or 'read' the video in the same way that a human can; although there are technological solutions that are starting to make this possible. Instead, it must rely on other text on the page, as well as the metadata added, to determine what the video is about. The search engine also needs to look for ways to measure relevance.

Marketers and website owners now need to optimise all their various forms of content, be their text pages, images or videos, in order to achieve better rankings. Video search engine optimisation (VSEO) involves the use of basic SEO foundations and additional creative optimisation methods to ensure that online video content appears higher up on the SERPs.

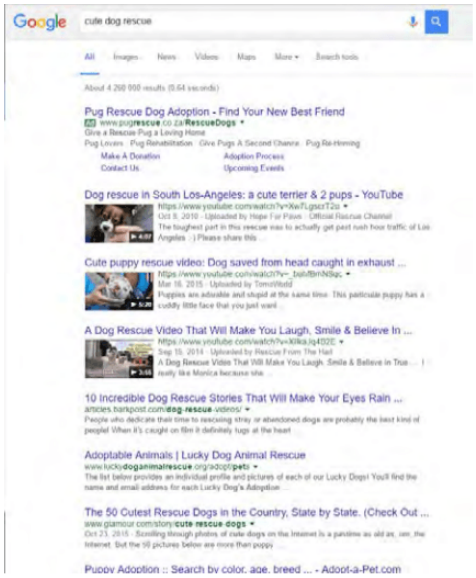


Figure 19.4.2: A search result for the words "cute dog rescue" brings up videos as well as ads, articles and org sites *Adapted From Screenshot, Google, 2017*

Optimising video for video-sharing sites such as YouTube means that you will appear not only in search results on the video-sharing site, but also on SERPs such as Google. While each video-sharing site will use its own algorithm, the guidelines below can be considered best practice across most of the video-sharing sites.

1. **Video title is very important.**

Video title is one of the first things a user sees when clicking through to a video, and is used first and foremost by the video search engines to determine the relevance of your video to the search query. Your most important keywords should appear in the first three words of the title. Longer, descriptive titles are better than short, concise and obscure ones.

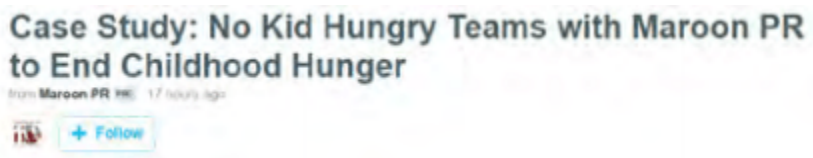


Figure 19.4.3: Video title on Vimeo *Adapted From Screenshot, Vimeo, 2017*

2. **Use informative, long descriptions.**

> **Note**
>
> If you are creating a video series, use a standard naming structure for the title to make all videos easier to find.

Descriptions will contain key terms that search engines should be looking for to determine what the video is about. Use your most important keywords here! You can include as much information as possible, but put the most important information in the first 25 characters. You can include a link in your description, enabling you to direct users to other content that you have.



Figure 19.4.4: Video description on YouTube *Adapted From Screenshot, YouTube, 2017*

3. **Use the tags to input several keywords.**

Put your most important keywords first. You can also capitalise on popular search terms and piggyback on popular or topical phrases. The video hosting site will use your tags to help categorise your video. YouTube has also introduced hashtags to make searching easier; some other platforms already use these. Ensure that tags and hashtags are relevant to your video and utilise terms from the same category.

YouTube Suggest and Google Suggest are useful tools for generating ideas. You can view the tags other users use on YouTube to get some ideas by choosing 'view page source' from your browser's menu and doing a search for 'keywords'.

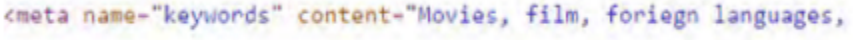


Figure 19.4.5: Video tags in HTML source code *Adapted From Screenshot, YouTube, 2017*

4. **Encourage comments, subscriptions, ratings, embedding and sharing.**

Get users to engage with your video in any way you can, and don't forget to respond to relevant comments. It's critical that your budding community feels that they matter and that you are taking them seriously. This is a key point to remember if you want to create a thriving community. Engagement is a massive factor in search engine rankings, so it is very important to focus on content; strong optimisation is no substitute for weak content.

To incite discussion, consider posting a comment as soon as you have uploaded a video, or adding a video card to encourage feedback. Pose a provocative question to spark discussion and lead the conversation. The absolute key to success in the social media space is engagement.

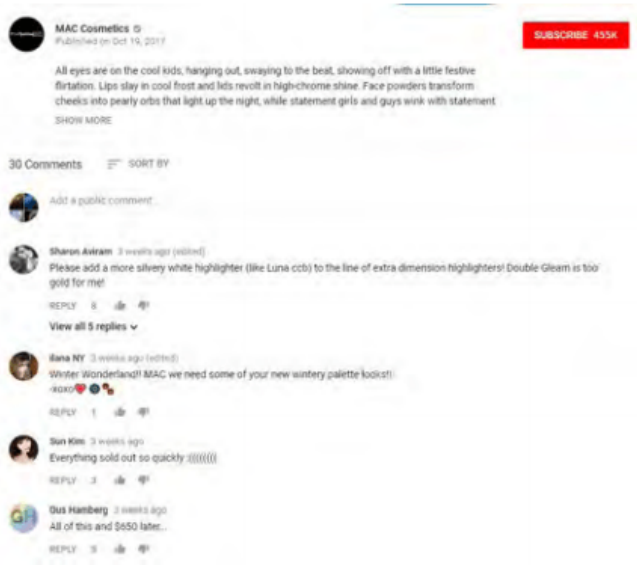


Figure 19.4.6: YouTube comments showing engagement with the brand *Adapted From Screenshot, YouTube, 2017*

5. **Optimise the thumbnail**



Figure 19.4.7: Three thumbnail choices for YouTube videos – note the clear branding and/ or use of people to draw attention *Adapted From Screenshot, YouTube, 2017*

Consider adding an enticing thumbnail frame. YouTube allows you to choose any moment in the video to be the thumbnail, and many other video platforms also give you this opportunity. Simply optimising the thumbnail image can encourage increased clickthroughs and views, which helps to increase search visibility.

6. **Use video cards and end screens**

Use video cards to link to and from other video properties. Cards allow you to add text boxes with clickable URLs which are crawled by the search engine spiders as well, at points of your choosing in your video. Cards in already popular and current videos can be used to drive traffic to new videos, although it should be standard practice to include them in a video as soon as it has been uploaded. It's also a great way to encourage viewers to subscribe to your YouTube channel.

The nature of YouTube is such that the number of views for pages on which videos are watched is always higher than channel views. However, if a paid search campaign is being run, the option to play clicked videos on the channel page exists. This is optimal as it could boost interactions with the branded channel header image, increase engagement with the playlist, and raise the channel view stats.

> A great way to use end screens is to link to some of your other videos at the end. This works similarly to 'articles you may like' at the end of a blog post. You can also use video cards to do this during the video.

7. **Upload videos regularly**

Upload videos regularly to ensure continuous channel activity and topical interest. Consider the nature of the brand and what you are trying to communicate to your viewers; you must decide how often videos are uploaded. But remember, the more videos you upload, the higher your channel will rank as a result of Google picking up on your fresh content. Think of it like a TV schedule. let users know when your 'show' is on so they know when to come back.

It also helps to delete videos that are not successful. The amount of content you upload is also dependent on the service or product your brand offers, and your video budget. It's a careful balance of not overloading your channel with useless media and keeping content fresh and engaging.

Promoting

We've covered promoting your video in detail in the next section. There are three ways you can promote your video using owned, earned and paid media channels.

Engaging the community

As we mentioned earlier, it's essential that you engage with your community to keep them coming back for more. Respond in a timely manner to any comments or questions, and take feedback on your content into account when planning new videos. The audience won't stay hooked for long, after all, there are millions of new videos being added every day, so ensure that you engage with them to create a sense of community, the ability to relate to them, and genuine interest.

Reporting

As with all digital marketing tactics, in video marketing it's essential to track and analyse data about your activities, and then to optimise your strategy accordingly. When creating video content, use the various measurement options available to determine what you can do better going forward.

YouTube Analytics is a free tool that enables anyone with a YouTube account to view detailed statistics about the videos they upload to the site. You can see how often videos are viewed in different geographic regions, as well as how popular they are relative to all videos in that market over a given period of time.



Figure 19.4.8: YouTube Analytics *Adapted Form Crunch Data, 2017*

You can also delve deeper into the lifecycle of videos, such as how long it takes for a video to become popular, and what happens to video views as popularity peaks. YouTube even breaks down the specific second when users stop watching the video.

Using these metrics, you can increase your videos' view counts and improve popularity on the site. For example, you might learn that your videos are most popular on Wednesdays, that they have a huge following in Spain, or that new videos that play off previous content become more popular more quickly. If you see users dropping off halfway into the video, add a video card to mix things up. There are many creative ways to approach this.

With this information, you can concentrate on posting compelling, fresh content that appeals to selected target audiences, and post these videos on days when you know these viewers are on the site. You could even go a step further and customise the video, dubbing it in Spanish, closed captions also support SEO efforts. The range of possibilities to customise, and optimise your

content is limited only by the brand's level of willingness.

Furthermore, you can access a breakdown of how viewers discovered a specific video, which can then be used to optimise the keywords, tags and descriptions of videos.

Facebook Analytics also gives you some information about your video's performance, though it tends to be less detailed.

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19.5: Video promotion

There are four main ways in which users find content and video online.

1. A user knows what sort of video they are looking for and goes directly to a search engine to search for content. This relies on SEO or search advertising, if you decide to promote the content on Google.
2. A user follows recommendations from others, found through emailed links, social bookmarking and sharing services, or social media such as blogs, Twitter, Facebook, and YouTube. This relies on social sharing.
3. Someone knows exactly what they are looking for and navigates to the appropriate URL directly. This relies on good branding and market awareness.
4. The user finds the video through paid advertisements and promotions. This relies on paid advertising.

Earned video promotion

We covered the general guidelines for optimising your video for search earlier in this chapter. Here are some specific considerations for YouTube search optimisation, as well as social sharing.

YouTube video search optimisation

YouTube, which is owned by Google, is still the dominant player in the video-sharing market despite increasing competition from social media sites. While we focus in this section on optimising for YouTube in particular, many of the same approaches apply to other video-sharing sites.

Once you've determined how users are already accessing your videos and where they appear in SERPs, you can use various techniques to improve your rankings. While YouTube, like Google, keeps its search algorithms a closely guarded trade secret, digital marketers can speculate and experiment to see what works and what doesn't.

Firstly, the following components are evaluated on a keyword and key phrase level by the search engine spiders:

- Titles
- Descriptions
- Tags
- Playlist additions
- Inbound links.

Additionally, YouTube defines relevance in accordance with the popularity of a given video as well as the interaction taking place around it. The following factors play a dominant role in the algorithm:

- Video views
- Channel views
- Ratings
- Comments
- Shares
- Embeds
- Subscribers
- Age of video.

Keeping YouTube content current and entertaining is vital if a video is very new. This will allow the video to engage with viewers. Remember, a new video growing in popularity (that is, views), will take preference in the SERP over an older video with more views.

Social sharing

You should initiate and encourage social sharing; ask your viewers to post your video on social networks, aggregators, social bookmarking sites, and other channels. The more users share, the wider an audience you can potentially reach, and the more

likely your video is to go viral or, at least, spread far and wide. Social sharing and recommendations are also increasingly relevant ranking factors for search engines.

Paid video promotion

In the same way as with Google's search advertising, you can pay to have your video recommended on YouTube. You are able to bid on searches or popular videos, show pre-rolls on other videos, and have your video content displayed alongside the search results of other videos. Paid promotions on YouTube are a cost-effective and quick way to promote video content, especially if the content is topical. It's targeted and controlled. For InStream, you pay only when a user watches 30 seconds or more of your video, or, if your video is shorter than 30 seconds, you'll pay only if they finish watching the entire clip. For InSearch and InDisplay, you pay-per-click on your video. This is a great opportunity for brand awareness, coupled with a potentially lower cost. However, some users find this form of advertising highly intrusive, particularly in markets where bandwidth is slow and expensive, and it may take several seconds for the ad to load before it can be skipped. Some ad blockers block YouTube advertising. Besides standard Display Ads, YouTube offers a wide variety of video ad types:

- **Overlay Ads**: These ads are only available on YouTube's desktop platform. They are 468 x 60 or 728 x 90 pixels and will appear in semi-transparent state over the lower 20% of the videos you choose to target. The ad can be text or images.
- **In-Search Ads**: These appear at the top of the search results page in YouTube, above the organic results and with a yellow "Ad" icon.
- **Discovery Ads**: These are thumbnail image ads that appear in the upperright corner of the search and watch pages.
- **Sponsored Cards**: Cards that appear during your video to display relevant products featured in the video.
- **Bumper Ads**: Non-skippable ads up to 6 seconds long that must be watched before a video can be viewed.
- **Video Ads**: These ads appear at the start of, or during, regular YouTube videos. These ads can be skippable after the first five seconds – in which case the full video can be 60 seconds long – or non-skippable, in which case the full video can be 30 seconds long. With this format, brands can include a small banner ad next to the video for free. Be sure to check out the YouTube Trends dashboard (www.youtube.com/feed/trending) to stay on top of the most popular videos at any given time.

> The video you use for these ads doesn't have to be an advert in itself, you could choose to promote some of your regular content too. Ensure that the key message appears in the first few seconds; to get viewers intrigued enough to keep watching.



Figure 19.5.1: YouTube advertising options *Adapted From Black Spartans, n.d*

Owned video promotion

If you are hosting your video content yourself, you can and should still optimise the content around it for best search opportunities. As with posted video, it's the text content on the page with the video that is so important.

Make sure that your page title is descriptive, as well as the video title and the video file name. The text on the page with the video

is important, so optimise it to reflect the content of the video. You can also use speech-to-text software such as Blinkx or Spinvox to transcribe the video. The text can then be used in the video metadata.

Use social media sharing chiclets to make it easy for visitors to share the video on their social networks, aggregators and blogs. If you have a Facebook page, post it there or upload it natively to Facebook. If you have a Twitter account, tweet about it! Don't forget to drive website visitors to your video content. put a link or strong call to action on your home page or main landing pages, to encourage visitors to view and engage with your videos.

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19.6: Facebook Video

While this chapter focuses on YouTube as the biggest video-only network, it faces a rising rival in Facebook. Although Facebook is a social network, it was boasting more than 100 million hours of video consumption per day back in 2016.

Facebook and YouTube are very different. People on Facebook don't have the same kind of intention when they come across a video as people who deliberately search YouTube might. Facebook videos also disappear from the feed comparatively quickly, while YouTube videos remain easily findable. For marketers, possibly the most important difference is what counts as a view – on YouTube, 30 seconds counts; on Facebook, only 3 seconds is registered as a view – and given that Facebook often autoplays videos, this can be reached before a viewer even notices the video in their feed.

Your approach to videos on Facebook can't be the same as YouTube. Some tips for Facebook Video:

- Videos need to be short (under 60 seconds). Facebook users want a distraction, and they're more likely to like and share shorter videos – which results in increased newsfeed exposure.
- Facebook users have short attention spans. You have 4 seconds to catch their attention and keep it. Make the first 4 seconds of your video count!
- Play around with Facebook's various video options – Live, 360, and even 360 Live. Live video gets considerably more engagement than pre-recorded.
- Let your viewer know what to expect in the post to entice them to click.
- Include a call to action – early on.
- As always, thumbnails matter – choose carefully.
- Most videos on Facebook are watched without sound – keep that in mind, and include closed captions (BufferSocial, 2017).

Remember, relevance is key for Facebook videos, so make good use of the Facebook targeting options (discussed in the Social Media chapters) to make sure your video reaches exactly the right people.

Don't forget that Facebook allows you to create video ads. It is one of the options on Facebook Ads Manager. Facebook also allows you to create short mid-roll ads that play in the middle of another video. The viewer must finish these before they can continue with the video.

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19.7: Case study - Nike Chicago Cubs Someday

One-line summary

Nike created a video celebration of the Chicago Cubs' first World Series win since 1908.

The challenge

The Chicago Cubs hadn't won a World Series in 107 years, so their win in 2016 offered brands a chance to show their support and win customer goodwill. Nike wanted to get in on this historic occasion.

The solution

Nike spent all week rallying Chicago with a "Make Someday Today" campaign that included billboards, social media, and more. On the night of the game, Nike purchased the first ad slot after the game and used it to air their video ad about a boy dreaming of winning the World Series.

They uploaded the video to YouTube. Because the branding in the video is subtle (mostly product placement on the boy's shoes and gloves), the video is not overtly promotional and thus more likely to appeal to online viewers. This makes it one of the rare examples of a TV spot that works just as well online. They followed some important best practice principles when creating this video:

- Producing great video content with a focus on value for the consumer rather than for the brand
- Effective targeting
- Relevance. It was timed well and was emotionally relevant to their target audience
- Engaging with users on social media to drive traffic to the video and sharing the video itself on social media as well
- Effective research to understand what would appeal to their target market.

The results

The video gained 1.5 million views within a week. It also gained a huge amount of earned media via sports coverage, news articles mentioning the video and social media shares, all of which were incredibly positive.



Figure 19.7.1: The Nike Someday ad, showing subtle branding and good use of annotations (the Nike swoosh) to include a call to action
Adapted From Digital training academy, 2016

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19.8: The bigger picture

Video marketing can form the cornerstone of a great content marketing strategy, linking closely with the other content that you create to engage and provide value to your customers. Videos can also be added to marketing messages such as email newsletters to improve engagement.

Because search engines serve a range of media types on their results pages, video content plays an important role in search engine optimisation. Not only can optimising videos for search increase your search engine ranking, but data show that it increases clickthrough rate from the search engine results pages, and that these visits are longer and more engaged than other search visits and more likely to result in conversions. Social media provides a great tool for spreading your video, and video content can be a strong driver for users to join your social media platforms. Make sure that you provide users with great value.

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19.10: Advantages and challenges

Posting regular video content shouldn't result in any push back, provided it is done in a focused, engaging way. Videos are great for engaging viewers and growing your social media community. However, 62% of consumers are more likely to have a negative perception of a brand that published a video they considered poor quality (Adelie Studios, 2016), so that focus and engagement are important.

By studying analytics, platform insights and comments, you can see which videos on your channel are providing users with what they're looking for. You can then choose to advertise your best videos with the various formats YouTube and Google have on offer and optimise future videos using this information.

Starting out with video production can be a bit challenging as you learn the ropes of what makes a viewable, entertaining video. It can also be difficult to come up with constantly new and interesting ideas, but this will become easier with time. Optimising video can also take a while to show results (as with normal SEO).

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19.11: Measuring Success

The number of views you get is an important factor in getting ranked or featured on YouTube and, by pushing your best content through the paid medium, you can get the ball rolling and significantly increase your chances of picking up organic traction (both within YouTube and Google's universal SERPs).

Number of views is far from the only important metric, however; you will also want to track:

- Average view time
- Conversion assists
- Clickthrough rate on the CTA
- Viewer engagement
- Drop off points (where the viewer stops watching).

All of these and more will help tell you whether your video is successful as well as where you can make changes to maintain viewer engagement.

Here is a handy guide from Buffer on Video Metrics (BufferSocial, 2017b).

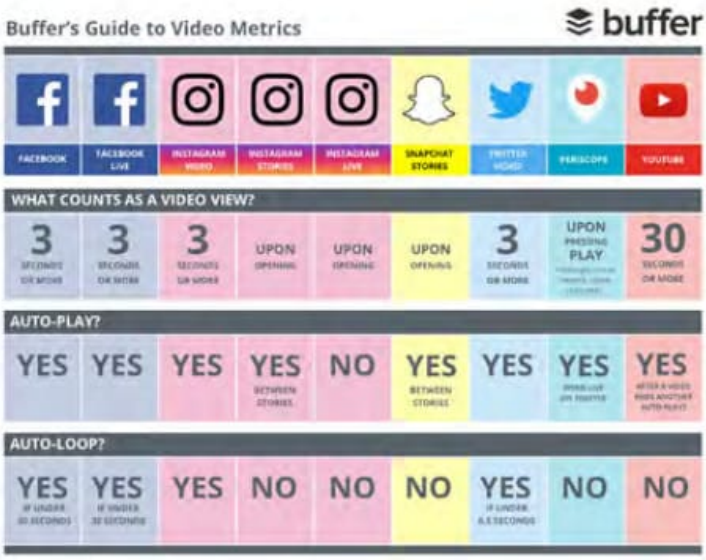


Figure 19.11.1: Video metrics across various popular platforms *Adapted From Buffer social, 2017*

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19.12: Tools of the trade

A wide range of tools are at your disposal to help with your video marketing efforts. Most of these are listed in the chapter already, so look at the relevant sections for pointers on what to use.

YouTube is the king of video content marketing and offers a full suite of tools from video hosting and optimisation to paid advertising, analytics and social promotion. AdWords for Video (https://adwords.google.com/video/SignupFlow) is a feature of Google's AdWords PPC tool that allows you to link your existing Google paid advertising account to your YouTube channel, and manage all your YouTube advertising from a single interface.

TubeMogul (www.tubemogul.com) is a video advertising tool that lets you buy paid video placements across the web. It simplifies the process of placing and paying for video adverts.

Feed (feedcompany.com) is a video seeding tool, a very handy thing to have if you host your videos on a variety of video platforms. Video seeders allow you to upload the video once, and then automatically upload that video to all of your chosen profiles and platforms for you.

Brightcove (www.brightcove.com) is a leading video hosting and publishing platform. Brightcove Video Cloud gives you everything you need to deliver professional quality video to audiences on every screen.

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19.E: Video Marketing(Exercises)

Case study questions

1. When producing video content, what key points do you need to keep in mind?
2. How did Nike use best practices when creating their video?
3. How did online and offline channels work together to contribute to the success of this video?

Chapter questions

1. Why should commenting on videos be encouraged?
2. What sort of personalisation would self-hosting of a video allow?
3. How do you feel social media affects video marketing?
4. What possible obstacles could a brand face when seeding a viral video?

Further reading

tubularinsights.com – Regularly posts updates and developments in the world of online video.

youtube.googleblog.com – YouTube's official blog. If there are announcements likely to affect a YouTube user, this is where you'll find them first. mashable.com/category/online-video – Insightful and current articles on online video trends.

vimeo.com/channels/staffpicks – Curated Vimeo videos picked by staff members – some great creative inspiration.

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19.S: Video Marketing(Summary)

Video has become an integral part of the online world. The potential for exposure, as well as interaction, is massive, and brands that fail to capitalise on this risk being left behind as competitors build thriving communities.

As with most content, it is up to the brand to decide how to represent its video content. Videos can be hosted on popular video-sharing websites to capitalise on already existing audiences and developed interfaces, or on bespoke websites that allow for free reign in customisation. Brands should then aim to optimise their videos on the chosen platforms to increase their visibility on search engines.

Creating a healthy community is also important in increasing exposure. Very rarely, if ever, does an audience come to video content without input from the creators. On top of optimising for search and other tweaks, brands should upload content regularly or risk losing any ground gained. Social media should also be considered as its platforms allow for the sharing of content, as well as commentary. Overall, brands should be aware that there is no quick fix for video. It requires planning and investment as well as long-term commitment to creating brand advocates.

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20: OPTIMIZE - CONVERSION OPTIMIZATION

Learning Objectives

In this chapter, you will learn:

- Which digital marketing tactics you can test and improve.
- How to pick the right test for your goals and purpose.
- How to perform conversion optimisation step by step to improve the effectiveness of your online marketing efforts.

20.1: Introduction

20.2: Key terms and concepts

20.3: What can you test?

20.4: Designing tests

20.5: Step-by-step guide to conversion optimisation

20.6: Tools of the trade

20.7: Case study - Tinkoff Bank

20.8: The bigger picture

20.9: References

20.E: Conversion Optimization

20.S: Conversion Optimization(Summary)

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20.1: Introduction

Let's look at a real-world example to help explain what conversion optimisation is. Think of a shoe store. When laying out the store, a lot of care has been taken in determining where to place displays, mirrors, chairs and the till. However, there is no way of easily determining if the current layout is the best option.

For example, the till may be at the front of the store. It may be worth testing to see if moving the till to the middle of the store affects sales. This would require tracking sales over a period of time with the till in the front of the store, then shutting down for a few days while the store is reorganised, and then tracking sales with the new layout, all a little impractical.

However, if we have an online store, we can just show slightly, or very, different versions of web pages to visitors, and track how different versions affect sales. We don't need to shut down our website to create new versions, and we can watch the real-time results emerge as hundreds of customers pass through the store. The cycle of tweaking and testing websites in this way is called conversion optimisation. This chapter will take you through the steps in a conversion optimisation process, helping you understand how to make things work better.

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20.2: Key terms and concepts

Table 20.2.1

Term	Definition
A/B test	Also known as a split test, it involves testing two versions of the same page or site to see which performs better.
Ad Server	The technology that places ads on websites.
Call to action	A phrase written to motivate the reader to take action such as sign up for our newsletter or book car hire today.
Click path	The journey a user takes through a website.
Cookie	A small text files that are used to transfer information between browsers and web servers. They help web servers to provide the right content when it is requested.
Conversion	Completing an action that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Conversion rate	The number of conversions divided by the number of visitors expressed as a percentage.
Funnel	In web analytics or conversion optimisation, an established set of steps a user should take in reaching a goal, such as making a purchase.
Heat map	A data visualisation tool that shows levels of activity on a web page in different colours. Hypothesis A statement that is being tested.
Landing page	The first page a visitor sees on a site. Usually it is specific to a campaign being run.
Micro-conversion	A small conversion in the path to a full conversion, such as going from step one to step two in a checkout process of four steps.
Multivariate test	Testing combinations of versions of the website to see which combination performs better
Null hypothesis	The default or general position, usually where no difference is the hypothesis
Split test	Also known as an A/B test.

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20.3: What can you test?

The short answer: everything! However, there are some good tactics to start testing.

Email marketing

The most obvious place to start testing your email marketing is with subject lines. A simple split test will help you to determine which version of a subject line improves open rate. Within an email, you can test your call to action copy to see how you can improve clickthrough rates. Email is also a good medium to test different kinds of offers to see how they influence sales. These can be combined with testing different types of content: long copy versus short copy, or images versus video.

You can also test delivery days and times for your email, either with a split test or by testing with your whole group at different times of the year.

Display and search advertising

There are many different conversion points you may want to test with advertising. You can test to see how different adverts may improve clickthrough rate, or you can test to see how different adverts affect the conversion rate of the traffic coming to your website.

Different calls to action in the adverts can be tested, as well as different headlines. When it comes to display advertising, completely different versions of banner adverts can be tested.

Most Ad Servers, including Sizmek (www.sizmek.com) and Google's AdWords, have built-in testing. This means that no additional code is required in order to run tests. In most cases, the Ad Server will also serve adverts based on the results of the test, so that the better-performing advert is given preference over time.

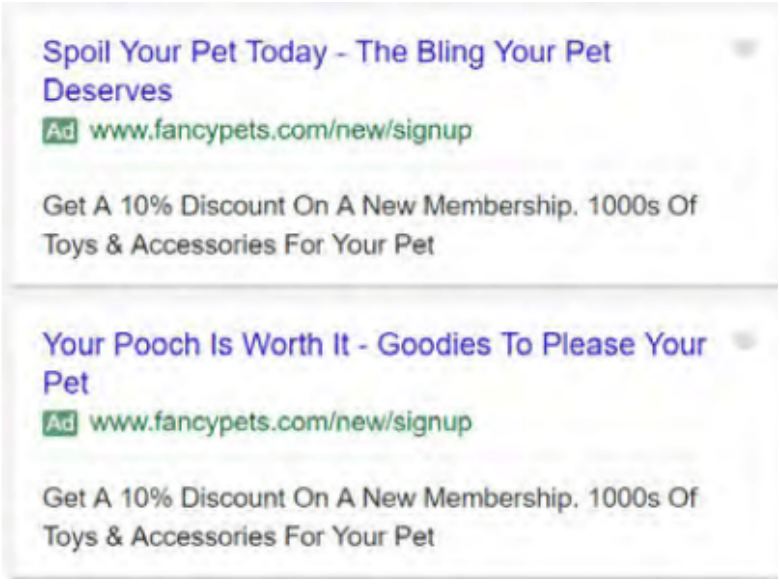


Figure 20.3.1: Two search ads with different headlines *Adapted From Screenshot, Google, 2017*

Social media

If you are broadcasting or distributing messages via social media, you should test your messages to see which perform better. Usually, you will be testing to see how you can increase engagement, whether that's replying to messages, liking Facebook posts, retweeting posts shared on Twitter, or clicking through on links shared.

Types of messages can be tested to see which increase interactions. Some options to try are direct questions, shared links, overt requests to take an action, or other messages to generate engagement. Types of media can be tested, such as images versus video. Time of day or day of the week can also be tested, to see how these affect interactions.



Figure 20.3.2: Facebook Insights showing what kinds of social media posts make the biggest impact on your followers? *Adapted From Buffer, 2017*

It can be trickier to test social media messages scientifically, as the environment is difficult to impossible to control.

Landing pages

A landing page is the first page a visitor sees on a website. In some web analytics packages, it is referred to as an entrance page. Any page of your website could be a landing page, especially if users are coming to your website via search engines.

However, when you are running online campaigns that utilise tactics such as email marketing or online advertising, you often send visitors to a specific landing page. Because you choose the page that visitors see first, you have an opportunity to craft a page that converts. There are many things you can test on landing pages.

- **Heading**: Different headings can make your visitors behave differently.
- **Copy**: Style, tone, layout and length of copy can all be tested, as well as things like the font size.
- **Call to action**: Different calls to action could increase actions.
- **Colour**: Test the colours of buttons, green and red are two common choices to try.
- **Images**: Ddifferent images can have an impact on conversions.
- **Offer**: Don't forget, you can also test different types of offers on a landing page or word the same offer differently.

eCommerce

There are many things you can test on eCommerce websites, but the most obvious are to test your product pages and your checkout process. With eCommerce, you are usually testing to increase your conversion rate (when more consumers buy from you), or to increase your basket size (when consumers buy more from you). As your testing becomes more sophisticated, you will hopefully be achieving both.

On product pages, you should be testing to see how you might encourage users to start the purchasing process. Some things to test include:

- **Images**: Images of different sizes, or entirely different image content, could make a big difference.
- **Call to action**: Seeing the words 'Add to cart' or 'Buy now' may affect shopper behaviour.
- **Shipping information**: Test to see whether displaying shipping costs before actual checkout affects the volume of customers starting the checkout process, as well as its effect on completing the purchase.
- **Credibility information**: Do 'secure shopping' badges affect conversion rate?

Product pages are also a good place to test how you might increase basket size. You can test displaying complementary or similar

products. If you spend time on Amazon, you'll see that they display items that customers bought together, suggesting you should do the same.

The checkout process is incredibly important to test. Often, an online purchase takes place over several screens, or steps. Instead of looking at the overall conversion rate, you should be looking at the conversion rate between steps. This is referred to as funnel analysis.

If possible, you should test a single-page checkout versus the multi-page approach. Test credibility and reassurance statements in the checkout process. Font size can also have an effect on conversions.

The above should give you an idea of where you can start with your conversion optimisation, but it is by no means an exhaustive list.

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20.4: Designing tests

To design tests successfully, you need to know what you can test, how you can test, and what sort of time periods you are looking at for testing. If it's your first time doing conversion optimisation, you should start with simple and quick tests, to get a feel for the process before embarking on more complicated tests.

Types of tests

When we talk about conversion rate optimisation, we are usually referring to running split tests. A split test is one where we show different versions of a web page to groups of users and determine which one has performed better.

We can run A/B tests. Here each version being tested is different from all the others. A/B tests always involve just two versions of what is being tested: the original and an alternative.

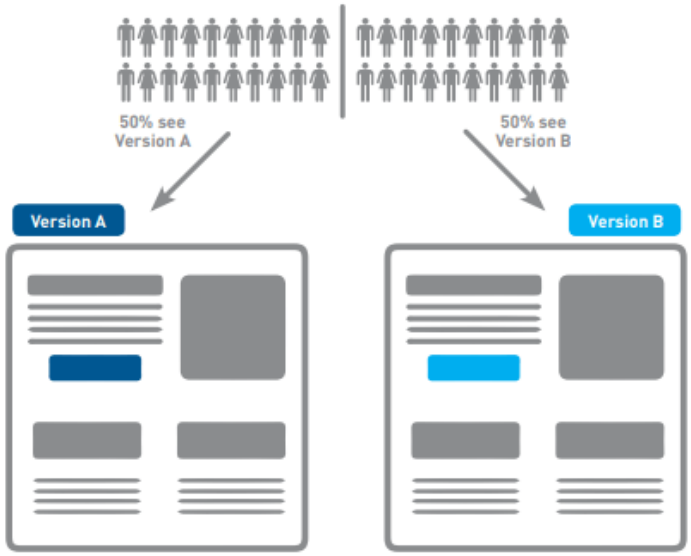


Figure 20.4.1: A/B testing explained visually *Adapted From Explore Web Solutions, 2013*

A/B tests are ideal for an initial foray into conversion optimisation, as they can be easy to set up. If you are running just one alternate and the original, it can also mean that you get a quicker result. When conducting A/B testing, you should only change one element at a time so that you can easily isolate what impact each factor has on your conversion rate.

We can also run multivariate tests, sometimes referred to as MVTs. Here, a number of elements on a page are tested to determine which combination gives the best results. For example, we may test alternative headlines, alternative copy and alternative call to action buttons. Two versions of three elements mean that we are testing eight combinations!

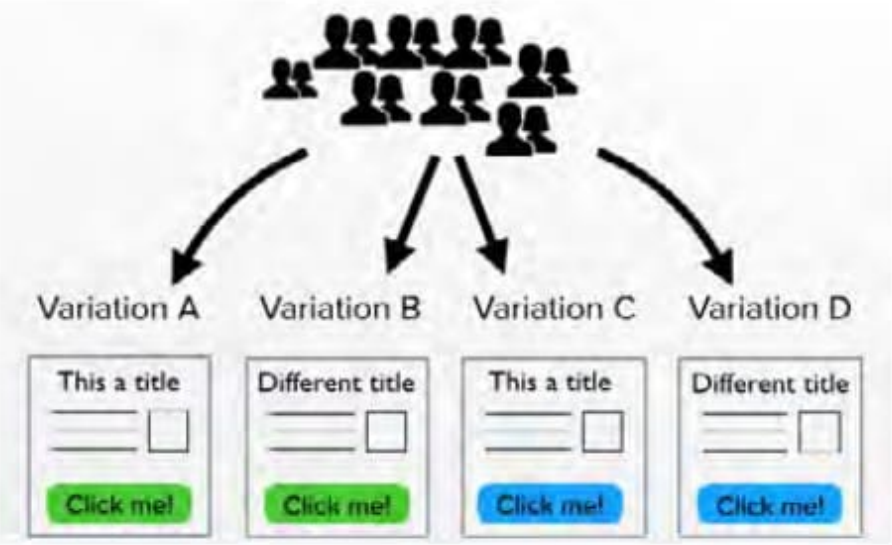


Figure 20.4.2: Multivariate testing combines a variety of elements *Adapted From Working Homeguide, 2014*

Multivariate tests can be more complicated to set up, but allow you to test more elements at once. Multivariate tests are ideal when you have large traffic volumes. If traffic volumes are not very high, it can take a very long time to reach a statistically significant result, especially if there are many combinations being tested.

Length of tests and sample size

Several factors determine which tests you can run. Relatively simple calculations help you to determine how long a test is likely to take, which is based on the number of participants as well as the improvement in conversion rate. We've included some sample size calculators in Tools of the trade, in section 20.6 of this chapter.

Number of participants

The number of participants in the test is determined by how many users actually see the page being tested, as well as what percentage of your potential customers you want to include in your test.

The number of users who see the page being tested may not be the same as the number of visitors to your website. You'll need to use your data analytics to determine the number of users viewing that specific page. Of course, if you are running advertising campaigns to direct traffic to the page being tested, you can always spend a bit more money to increase the number of users coming to that page.

You also want to determine what percentage of users will be involved in the test. In a simple A/B test, if you include 100% of your visitors in the test, 50% will see version A and 50% will see version B. If you include only 50% of your visitors in the test, this means that 25% of your overall visitors will see version A, and 25% will see version B. Including 100% of your visitors will give you results more quickly. However, you may be concerned that your alternative version could perform worse, and you don't want to compromise your performance too much.

Change in conversion rate

While this is not something you will know upfront, the percentage change in conversion rate also affects the length of a test. The greater the change, the more quickly a statistically significant decision can be made.

Number of variations

The more variations you have, the longer it will take to determine which combination performs the best.

These factors can then be used to calculate the suggested length of time for a test to run. There are several online calculators that do this for you. A good one to try is this one, offered by Visual Website Optimizer: visualwebsiteoptimizer.com/ab-splittest-duration.

Estimate Test Duration	Scenario 1	Scenario 2	Scenario 3	Scenario 4
# Test combinations	2	2	2	3
# Page views per day	200	200	300	350
% Visitors in experiment	100	100	50	50
% Current conversion rate	30	30	30	30
% Expected improvement	20	40	20	30
Days Duration	4.01	1.04	5.35	4.22

Figure 20.4.3: Small changes can affect your online testing *Adapted From Stokes, 2013*

It is usually preferable to test bigger changes or variations, rather than very small changes, unless you have a very large audience.

Designing for analysis

The purpose of running tests is to improve performance. To do this, you analyse your results against what you expected to find and then choose the option that performed better. This sounds simple, but how do you know what counts as better enough to warrant a change? Is it one more click than the other option, three more clicks, or should one perform 25% better than the other? You also need to think about chance: how certain are you that the differences in your results were not just coincidental? These can be tricky questions.

To determine which option in your split test did better, set parameters and assess the statistical significance of your results. In statistics, we create a null hypothesis. For split tests, the null hypothesis is that there is no difference between the performance of the two options and any difference recorded is due to chance. You then use statistics to calculate the p value, which shows whether the difference was likely due to chance (or not). If the difference is significant, it is probably not due to chance. Generally, to be significant, the p value should be less than or equal to 0,05, indicating a less than 5% probability that the difference in performance between the two options was due to chance.

You do not have to be able to perform the complex statistical calculations. Handy tools like VWO's split test significance calculator will do this for you. All you have to do is enter the number of users that visited your control version and the number of conversions, as well as the number of users that visited the variation and the number that converted. The calculator then provides your p value and states whether your test is significant enough to change to the variation. You can find the calculator here: https://vwo.com/ab-split-test-signif...ce-calculator/

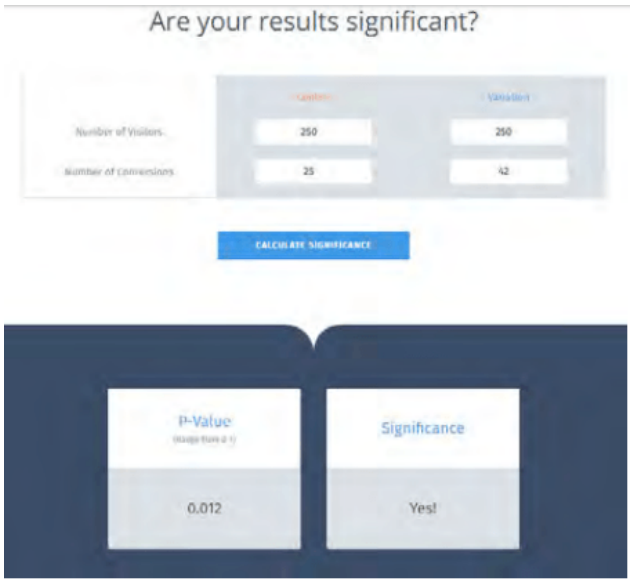


Figure 20.4.4: The results from VWO's significance calculator *Adapted From VWO, 2017*

When designing your tests, it is important to consider the null hypothesis and set the parameters for significance. By keeping these aspects in mind, you will develop tests that allow for clearer and easier analysis, which will make the whole testing process that much more effective.

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20.5: Step-by-step guide to conversion optimisation

Proper planning is important to achieving success with your conversion optimisation. Whatever the outcome of your test, if you've planned and documented carefully, you'll always learn something.

The basic approach to conversion optimisation is:



Figure 20.5.1: The Conversion optimisation process

Step 1. Gather data

The very first step is to gather data about the site you are testing so that you can make smart decisions about what to test and how. There are many sources that can be used, depending on the nature of the site that you are testing. Of course, you also need to know the business for which you are testing, what do you want website visitors to do?

- **Analytics data**: Existing web analytics data can be used to determine which pages in your site should be tested. You can also gather data about particular pages on your site using tools such as Crazy Egg (www.crazyegg. com) or ClickTale (www.clicktale.com).
- **User data**: User labs or simple site surveys (www.kissmetrics.com is a useful tool for these) can also be used to add qualitative data to the quantitative data gathered using web analytics tools.



Figure 20.5.2: A KISSmetrics' Lead funnel report that shows conversion rate *Adapted From G2Crowd, 2017*

- **Customer service data**: If you are running tests for a site where users also speak to customer service, you can gather data about the site from customer service representatives. They should have information on common reasons why visitors make a phone call. Your CRM system may also hold some valuable data.

Step 2. Analyse

Having gathered data, you need to analyse it intelligently so that you can start designing tests. There are some key questions that you need to answer at this stage.

What should users be doing on the site?

This is where you look at the actual conversion. Usually, this is an action taken by a user that increases revenue for a business. There are obvious conversions to look at, such as placing an order or completing a lead generation form. However, it can also be useful to understand less obvious conversions, or micro-conversions.

You could run a test to see what would reduce the bounce rate of a page. The aim of an online bookstore is to sell books, but they could also test to increase newsletter signups, and focus on selling books later. Micro-conversions can also refer to the path to conversion. Often, there are established steps a visitor should take in the conversion process. Conversion optimisation can look at each step. The Visitor Flow report in Google Analytics can be a great help in providing this insight. Knowing what actions or conversions you are testing is about knowing the business and its website well.

Who is coming to the site, and why?

To understand who is coming to the website, and why, you need to look at data that tells you about your visitors and about how they got to your website. Visitor information includes their location and richer demographic information, such as age and income, if available. Another key point to look at is the type of device they use, desktop, tablet, or mobile phone, for example.

To understand why these visitors come to your website, you need to be able to analyse your sources of traffic. The search keywords sending you traffic should tell you something about the intent of your visitors, for example.

What are they doing on your site?

Of course, now you need to understand what your visitors are doing, and why they're not doing what you want them to do. Here you need to look at metrics such as bounce rate and exit rate for important pages. As well as examining your overall conversion rate, look at the steps in the process and see where those drop offs occur.

Look at which page is the most visited landing page, especially as this may not be the home page. Look to see which pages are exit pages, and determine if those should be the last pages a user sees on your site. You can use internal site search information to see if visitors are looking for particular information on your website.

Step 3. Fix anything that's broken

As part of your analysis, you may have identified problems that can be fixed without testing. Before you continue, fix these! You should also try to understand if there is traffic coming to your site that is not relevant, and try to segment that traffic from your calculations.

For example, if you have a beautifully designed website that sells custom couches, but is featured in a website design gallery, you may get a lot of traffic that is coming only to look at your site, and not to buy couches.

Step 4. Design tests

By now you should know what areas of your site need testing, so it's time to design tests.

Wishpond (2016), provides

The 3 Step formula for creating an A/B Testing Hypothesis. These are:

Step 1: Conversion problem

Why aren't people converting?

Step 2: Proposed solution

What tests can be run to fix the conversion problem?

Step 3: Impact statement

How do you anticipate your proposed solution will affect the conversion problem.

You now have a sound A/B testing hypothesis.

Step 5. Run tests

Implement the tracking code needed to run your tests. Most testing software uses cookies to ensure that return visitors see the same version of the test they saw initially. You will also need to put tracking code on your conversion page. Before taking your test live, test to make sure that the tracking code does not conflict with any other code on your website.

If everything checks out, take your test live, and wait for the data to be collected. Check in regularly to see how the test is proceeding, and wait for a statistically significant outcome.

Step 6. Report and repeat

When you have a result, it's time to report on it. Refer back to your null hypothesis to determine if the outcome was as expected and if it was statistically significant. In your report, you should include why things went as expected, or why not.

Implement the better-performing solution, and plan your next test. There is always something you can improve.

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20.6: Tools of the trade

Online, conversion optimisation relies on being able to record which version of a test a web visitor sees, and whether or not that visitor converted. A returning visitor should also see the same version they saw the first time to avoid confusion. There are many software solutions that help you to do this.

Google now provides a dedicated tool called Google Optimize for website and AB testing, as well as personalisation solutions. It integrates seamlessly with Google analytics, provides for split testing, multivariate testing and redirect testing. A builtin visual editor helps you to create variations to test, without needing to recode each page. Optimize makes managing your experiments much simpler with an activity log, experiment previews and by keeping track of user permissions. By facilitating testing, Optimise enables you to create pleasant and engaging user experiences for your customers when they visit your website.

There are many split test calculators online that help you to determine the significance of split tests if you are running them yourself. Try www.usereffect.com/ split-test-calculatoror vwo.

Kissmetrics is a popular analytics package that also includes testing and optimisation features. It refers to itself and a customer engagement automation system. It is a system designed for deep data tracking, and provides real insights into performance and user experience. Its ability to store information from every customer who ever interacts with your brand, not only assists with CRM, but sales leads as well. www.kissmetrics.com/

ClickTale is a web analytics tool that helps you to visualise how particular pages are performing by showing heat maps of mouse movements and clicks on a page. It also offers form analysis, showing how particular form fields may be affecting completion rate: www.clicktale.com

HubSpot offers a free tool, HubSpot Marketing Free, which helps you improve your conversion optimisation. You can add a popup CTA to your site, and HubSpot will give you in-depth insights on prospects and current contacts. Find it here: www.hubspot.com/products/marketing/free.

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20.7: Case study - Tinkoff Bank

One-line summary

Tinkoff Bank, one of Russia's top four credit card issuers, improved its website conversion rate using split testing.

The challenge

Tinkoff Bank relies on its website for finding new customers, as it operates on a digital platform rather than using physical branches. Users fill in an application form on the website and submit it for approval, then receive their credit card at their homes.

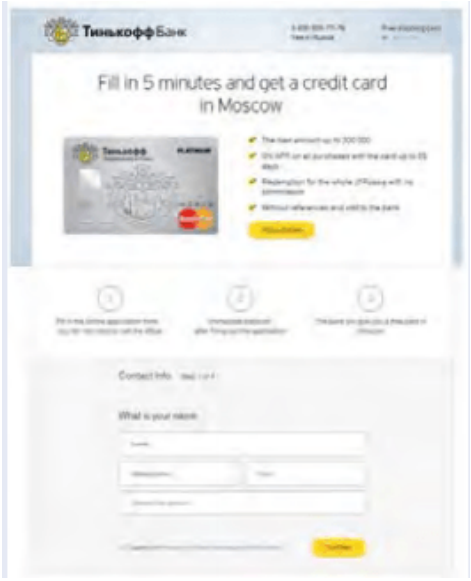


Figure 20.7.1: The original credit card application page for Tinkoff Bank *Adapted From VWO, 2015*

The application page involves a multi-step form and details about the application process and credit card plan. The form submission counts as a conversion. Tinkoff is always looking for ways to increase these conversions.

The solution

Tinkoff identified key pages on the site that could be optimised. It used web analytics data to discover that the credit card application page had a high bounce rate, so it focused on helping the user stay on the application page to complete the conversion. They introduced new features in three areas:

1. An additional information box
2. Gamifying the form with a progress bar
3. Allowing users to fill in their details later on.

Additional information box

Tinkoff worked off the assumption that offering additional details about the credit card would increase signups. They created two variations of the original page. The first had a hyperlink to 'more details' under the CTA, which led to a new page with additional information.



Figure 20.7.2: The first additional information variation for Tinkoff Bank *Adapted From VWO, 2015*

The second variation opened a box right below the link instead of leading to another page.



Figure 20.7.3: The second additional information variation for Tinkoff Bank *Adapted From VWO, 2015*

Progress bar

Here, the bank used the hypothesis that a progress bar on top of the four-step application form would encourage users to fill in the form completely.

They used two variations. The first had a yellow banner-like progress bar above the form that highlighted the step the user was currently on and used a black line to show the user's progression.

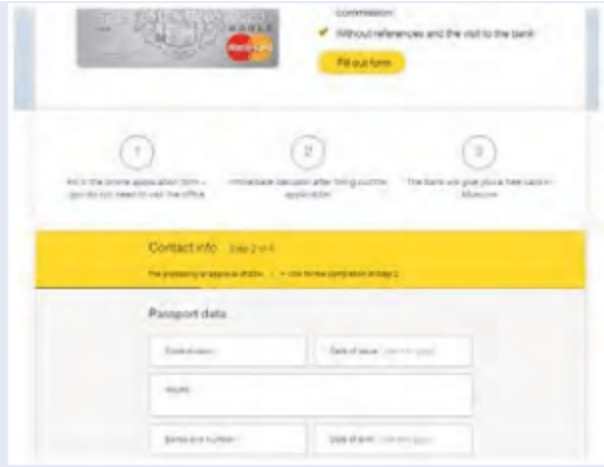


Figure 20.7.4: The first progress bar variation for Tinkoff Bank *Adapted From VWO, 2015*

The second variation had a green progress bar without an extra line to show the user's progress. Instead, the green portion of the bar grew as users moved through the form.

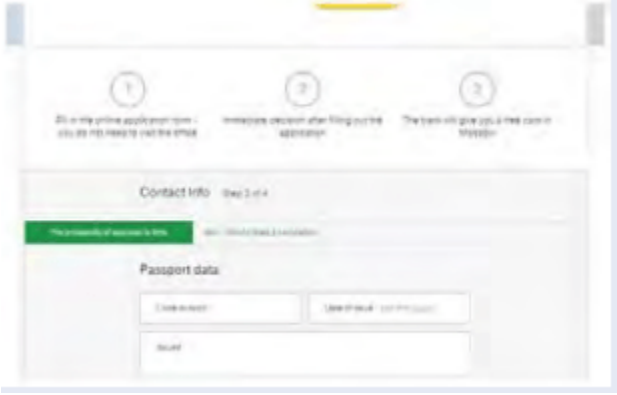


Figure 20.7.5: The second progress bar variation for Tinkoff Bank. *Adapted From VWO, 2015*

Filling in details later

Tinkoff Bank thought that allowing users to fill in passport details later on would increase the number of submissions. This time, they only created one variation to compare to the original.

When users reached the section for passport information, they could click a box saying, "Don't remember passport details", and a window would appear asking them to choose phone or email to provide their details later on.

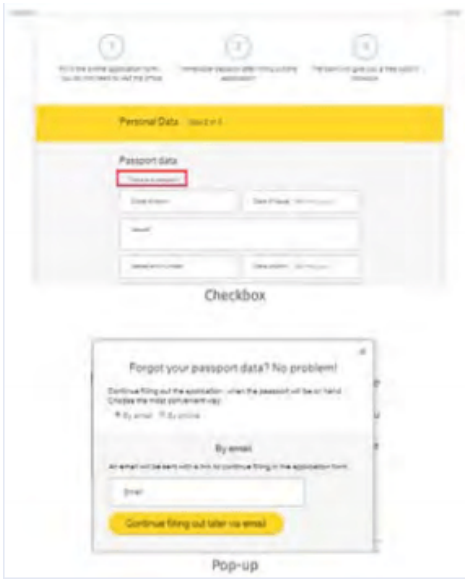


Figure 20.7.6: The variation allowing users to fill in details later for Tinkoff Bank. *Adapted From VWO, 2015*

The results

Additional information box

The first variation, with a link to another page with extra information, did worse than the original page. However, the second variation:

- Improved conversion rates by 15.5%
- Had a 100% chance of beating the control.

Why these results? Key differentiators on a web page can improve conversions, and emphasising free shipping and the bank's credibility both made users feel happier about their choice. However, the first variation led users away from the signup form, adding additional effort to return to the form.

Progress bar

Both progress bars outperformed the control. The first variation had a 6.9% higher conversion rate than the control, and the second variation improved the conversion rate of the original by 12.8%. Both had a 100% chance to beat the original page.

Why? Users don't like lengthy forms but a progress bar can be reassuring.

Filling in details later

The variation was a resounding success:

- The conversion rate of the form improved by 35.8%
- The after-filling conversion rate improved by 10%.

Remember, users are less likely to complete a form if they are led away from it, and fetching a passport would mean leaving the form (VWO Blog, 2015).

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20.8: The bigger picture

As you've seen at the start of this chapter, conversion optimisation applies to just about every part of your digital marketing strategy. Almost any tactic can be tweaked, tested and improved. In fact, this is best practice and highly recommended.

Conversion optimisation also speaks to a bigger consideration about keeping your channels up to date in the ever-changing online marketing space. Keeping things fresh and constantly improving is the way to go. Not only does this entice your customer, it also reflects on your bottom line, making valuable, incremental improvements increases your earnings in the short term, and decreases the need for radical changes over time.

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20.9: References

References VWO Blog, 2015. 3 Ways Tinkoff Bank Optimized Credit Card Conversions – Case Study. [Online] Available at: vwo.com/blog/tinkoff-case-study [Accessed 13 November 2017]

Wishpond, 2016. The 3 step formula for creating an A/B testing hypothesis. [Online] Available at: https://blog.wishpond.com/post/11567...ing-hypothesis [Accessed 20 October 2017]

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20.E: Conversion Optimization

Case study questions

1. Why did Tinkoff bank try two different variations for the first two tests?
2. Why was testing so important in this case?
3. Discuss why the winning variation outperformed the others in each case.

Chapter questions

1. Describe a situation where an A/B test would be more suited as a data-gathering method than a multivariate test.
2. What is a conversion rate, and why is it so important to marketers?
3. What can you test on an eCommerce product page? List three examples.

Further reading

www.grokdotcom.com – FutureNow's GrokDotCom offers commentary, case studies and conversion optimisation best practice.

www.whichtestwon.com – Anne Holland's Which Test Won shows case studies where you can guess the result, and compare your prowess to that of other visitors.

Always Be Testing: The Complete Guide to Google Website Optimizer by Bryan Eisenberg, John Quarto-von Tivadar and Lisa T. Davis

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20.S: Conversion Optimization(Summary)

Conversion optimisation is the process of testing to increase the conversions from a website or digital campaign. A conversion can refer to any action that a web visitor takes. Tests are either A/B tests, or multivariate tests. It's important to understand the business and customers, so you can create appropriate, useful tests.

The basic approach to conversion optimisation is:

1. Gather data
2. Analyse data
3. Fix anything that's broken
4. Design tests
5. Run tests
6. Report and repeat.

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21: OPTIMIZE - DATA ANALYTICS

Learning Objectives

In this chapter, you will learn:

- The importance of analytics to digital marketing.
- What metrics you can and should be tracking.
- How to capture web analytics data.
- Techniques and guidelines for analysing data to better understand your users.
- How to present data clearly and how to use data visualisation to help users understand it.

21.1: Introduction

21.2: Key terms and concepts

21.3: Working with data

21.4: Tracking and collecting data

21.5: Analysing data

21.6: Data Visualisation

21.7: Tools of the trade

21.8: Advantages and challenges

21.9: Case study - eFinancialCareers

21.10: The bigger picture

21.11: References

21.E: Data Analytics(Exercises)

21.S: Data Analytics(Summary)

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21.1: Introduction

Picture the scene: You've opened up a new fashion retail outlet in the trendiest shopping centre in town. You've spent a small fortune on advertising and branding. You've gone to great lengths to ensure that you're stocking all of the prestigious brands. Come opening day, your store is inundated with visitors and potential customers.

And yet, you are hardly making any sales. Could it be because you have one cashier for every hundred customers? Or possibly it's the fact that the smell of your freshly painted walls chases customers away before they complete a purchase? While it can be difficult to isolate and track the factors affecting your revenue in this fictional store, move it online and you have a wealth of resources available to assist you with tracking, analysing and optimising your performance.

> **Note**
>
> Remember, analytics data can be found in many places, not just your website. Consider data from email, social media, mobile devices, and more. Refer back to the Data driven decision making chapter for more on this.

To a marketer, the Internet offers more than just new avenues of creativity. By its very nature, the Internet allows you to track each click to your site and through your site. It takes the guesswork out of pinpointing the successful elements of a campaign, and can show you very quickly what's not working. It all comes down to knowing where to look, what to look for, and what to do with the information you find.

At the beginning of this book, you learned how important it is for a business to be datadriven and client-focused. You also learned about a few of the forms and sources of data. Each chapter mentioned some elements you should track to measure the success of a particular area of digital marketing. Now you're going to learn more specifics about data analytics and how to analyse the data you've gathered.

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21.2: Key terms and concepts

Table 21.2.1

Term	Definition
A/B test	Also known as a split test, it involves testing two versions of the same page or site to see which performs better.
Click path	The journey a user takes through a website.
Conversion	Completing an action that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Conversion funnel	A defined path that visitors should take to reach the final objective.
Cookie	A small text file that is used to transfer information between browsers and web servers. They help web servers to provide the right content when it is requested.
Count	Raw figures captured for data analysis.
Event	A step a visitor takes in the conversion process.
Goal	The defined action that visitors should perform on a website, or the purpose of the website.
Heatmap	A data visualisation tool that shows levels of activity on a web page in different colours.
JavaScript	A popular scripting language. Also used in web analytics for page tagging.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Log file	A text file created on the server each time a click takes place, capturing all activity on the website.
Metric	A defined unit of measurement.
Multivariate test	Testing combinations of versions of the website to see which combination performs better.
Objective	A desired outcome of a digital marketing campaign.
Page tag	A piece of JavaScript code embedded on a web page and executed by the browser.
Ratio	An interpretation of data captured, usually one metric divided by another.
Referrer	The URL that originally generated the request for the current page.
Segmentation	Filtering visitors into distinct groups based on characteristics to analyse visits.
Target	A specific numeric benchmark.
Visitor	An individual visiting a website that is not a search engine spider or a script.

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21.3: Working with data

In the days of traditional media, actionable data was a highly desired but scarce commodity. While it was possible to broadly understand consumer responses to marketing messages, it was often hard to pinpoint exactly what was happening and why.

As the Data driven decision making chapter showed, in the digital age, information is absolutely everywhere. Every single action taken online is recorded, which means there is an incredible wealth of data available to marketers to help them understand when, where, how and even why users react to their marketing campaigns.

> Note
>
> Read more about this in the Data driven decision making chapter.

Remember, this also means there is a responsibility on marketers to make datadriven decisions. Assumptions and gut feel are not enough – you need to back these up with solid facts and clear results.

Don't worry if you're not a 'numbers' person – working with data is very little about number crunching (the technology usually takes care of this for you) and a lot about analysing, experimenting, testing and questioning. All you need is a curious mind and an understanding of the key principles and tools.

Here are some data concepts you should be aware of.

Performance monitoring and trends

Data analytics is all about monitoring user behaviour and marketing campaign performance over time. The last part is crucial. There is little value in looking at a single point of data, you want to look at trends and changes over a set period to encourage a dynamic view of data.

For example, it is not that helpful to say that 10% of this month's web traffic converted. Is that good or bad, high or low? But saying that 10% more users converted this month than last month shows a positive change or trend. While it can be tempting to focus on single 'hero' numbers and exciting-looking figures such as 'Look, we have 5 000 Facebook fans!', these really don't give a full picture if they are not presented in context. In fact, we call these 'Vanity metrics' they look good, but they don't tell you much.

> Note
>
> Pay close attention to any changes in the expected data, good or bad, and investigate any anomalies.

Big data

Big data' is the term used to describe truly massive data sets, the ones that are so big and unwieldy that they require specialised software and massive computers to process. Companies like Google, Facebook and YouTube generate and collect so much data every day that they have entire warehouses full of hard drives to store it all. Understanding how it works and how to think about data on this scale provides some valuable lessons for all analysts.

- **Measure trends, not absolute figures**: The more data you have, the more meaningful it is to look at how things change over time.
- **Focus on patterns**: With enough data, patterns over time should become apparent so consider looking at weekly, monthly or even seasonal flows.
- **Investigate anomalies**: If your expected pattern suddenly changes, try to find out why and use this information to inform your actions going forward.

Data mining

Data mining is the process of finding patterns hidden in large numbers and databases. Rather than having a human analyst process the information, an automated computer program pulls apart the data and matches it to known patterns to deliver insights. Often, this can reveal surprising and unexpected results, and tends to break assumptions.

Data mining in action

Krux (2016) offers the example of examining an enormous dataset for an automotive brand that wanted to improve brochure downloads and increase requests for test drives. The data they analysed related to consumers, consumer attributes, and marketing touchpoints.

To determine a pattern, they had to explore 47 000 000 000 000 000 000 000 combinations of factors, obviously, too many to evaluate without using machines. These combinations came from 35 touchpoints, including the website, campaigns, and other marketing channels, and 37 analytics points, including auto buyers and smartphone users.

The brand was able to spot relevant patterns, such as that consumers who bought a certain brand of car were more likely to download brochures, but not more likely to request test drives. This allowed them to segment the consumers who bought cars into those who started the purchase process by downloading a brochure, and those who started with a test drive.

The first group was detail-oriented, so ads featuring specific models with links to the specifications page helped to drive conversions.

The second group wanted to know how driving the car felt, so they were targeted with ads that appealed to their senses and included a call to action about scheduling a test drive. This helped to drive media efficiency and campaign performance.

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21.4: Tracking and collecting data

A key problem with tracking users on websites used to be that it was impossible to track individual users - only individual browsers, or devices, since this is done through cookies. So, if Joe visits the website from Chrome on his home computer and Safari on his work laptop, the website will think he's two different users. If Susan visits the site from the home computer, also using Chrome, the website will think she's the same user as Joe, because the cookie set when Joe visited the site will still be there.

> Email opens aren't tracked with cookies. Instead, when the images in the email load, a tiny 1×1 pixel also loads and tracks open rate. This means that if the user is blocking images, their activity will not be tracked.
>
> To track if those who did open your email then visited your page, or eventually converted, links within the email include utm tags. UTM tags are codes in the url that enable your analytics software to track where a user has come from.
>
> In this link: www.redandyellow.co.za/5-way...ium=email&utm_ campaign=AugNewsletter
>
> The campaign tracking tag appended on the end of the URL is: ?utm_source=newsletter&utm_medium=email&utm_campaign=AugNewsletter

An additional concern was the decline of cookies. Most modern browsers allow users to block them. With growing consumer privacy concerns, and laws like the EU Privacy Directive, which requires all European websites to disclose their cookie usage, cookies began to fall out of favour, making tracking more difficult.

Google's Universal Analytics changed all that. Because of Google's dominance in the search engine market, we will focus on them for this section.

Universal analytics

Google's universal analytics allows you to track visitors (that means real people) rather than simply sessions. By creating a unique identifier for each customer, universal analytics means you can track the user's full journey with the brand, regardless of the device or browser they use. You can track Joe on his home computer, work laptop, mobile phone during his lunch break, and even when he swipes his loyalty card at the point of sale allowing you to combine offline and online information about users.

Crucially, however, tracking Joe across devices requires both universal analytics and authentication on the site across devices, in other words, Joe has to be logged in to your website or online tool on his desktop, work laptop and mobile phone in order to be tracked this way. If he doesn't log in, we won't know he's the same person. Users who use Gmail are easy for Google to track because they'll be logged in across devices.

You can see:

- How visitors behave depending on the device they use (browsing for quick ideas on their smartphone, but checking out through the eCommerce portal on their desktop).
- How visitor behaviour changes the longer they are a fan of the brand, do they come back more often, for longer, or less often but with a clearer purpose?
- How often they're really interacting with your brand.
- What their lifetime value and engagement is.

Another useful feature of universal analytics is that it allows you to import data from other sources into Google Analytics, for example, CRM information or data from a point-of-sale cash register. This gives a much broader view of the customers and lets you see a more direct link between your online efforts and real-world behaviour.

How does universal analytics work?

Universal analytics has three versions of the tracking code that developers can implement, helping them track users on:

1. Websites
2. Mobile apps
3. Other digital devices such as game consoles and even information kiosks.

It collects information from three sources to provide the information that you can access from your Google Analytics account:

1. The HTTP request of the user: This contains details about the browser and the computer making the request, including language, hostname, and referrer.

> **Note**
>
> What kind of privacy concerns might a user have about the data you're collecting about them?

2. Browser and system information: This includes support for Java and Flash and screen resolution.
3. First-party cookies: Analytics sets and read these cookies to obtain user session and ad campaign information.

This information is sent to the Google Analytics servers as a list of parameters attached to a one-pixel GIF image request.

You don't need to know the technical details of how tracking works, but if you are interested, you can read about Google Analytics tracking here: developers. google.com/analytics/resources/concepts/gaConceptsTrackingOverview

How to set up Google Analytics

> **Note**
>
> You will need to make adjustments to your Analytics account so that you can get the most out of tracking your users. You can learn a little more about that here: moz.com/blog/absolutebeginners-guide-togoogle-analytics.

First, you need a primary Google account, used for services such as Gmail or YouTube. You can use this to set up your Analytics account. This should be set up using a Google account that will always be available for your business.

Next, go to www.google.com/analytics and follow the steps to sign up. You can set up multiple accounts here if you want to track a website, an app, or multiple websites and apps.

After the sign-up process, you will be issued a Google Analytics tracking ID. This will be UA followed by a series of numbers. You need to add this code to the HTML file of your website, before the tag, on each of your pages.

Now Google is tracking every visitor to your website!

> **Note**
>
> Try it now – go to a random website, such as www.redandyellow. co.za, and right click on it, then click 'View page source' to view the HTML code for the site. Do a search for 'UA-' to view the tracking code for that site. The tracking code for the website above is UA-43748615-1.

Google Analytics is, obviously, not the only analytics package available. Other packages exist for detailed tracking of social media accounts, emails, and website data. Website analysis should always account for any campaigns being run. For example, generating high traffic volumes by employing various digital marketing tactics such as SEO, PPC, and email marketing can be a pointless and costly exercise if visitors are leaving your site without achieving one or more of your website's goals. Conversion optimisation aims to convert as many of a website's visitors as possible into active customers.

Gathering data

Google Analytics can measure almost anything about the customers that visit your website. To gather the kind of data that can help you optimise your site, you'll need to know a little about where to look. When you log into your analytics account, you will see seven main menu items on the left. They are:

> **Note**
>
> Read more about this in the Conversion optimisation chapter.

Views

The Views button lets you switch between various pictures of the data.

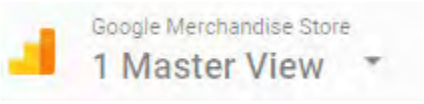


Figure 21.4.1: The Views button *Adapted from Screenshot, Google, 2017*

Customization

The Customization tab lets you create dashboards that give you an overview of different data elements, custom reports, shortcuts, or custom alerts.

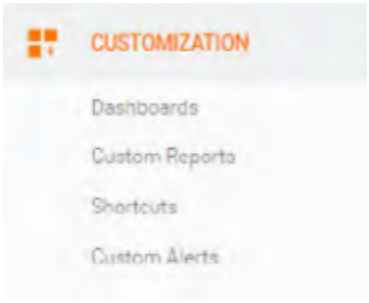


Figure 21.4.2: The Customization tab *Adapted from Screenshot, Google, 2017*

Real time

Real time allows you to monitor activity as it happens on your website. Data updates continuously so that you can see how many users are on your site right now, where they are from, the keywords and sites that referred them, which pages they are viewing, and what conversions are happening.



Figure 21.4.3: Part of Google's Realtime overview tab *Adapted from Screenshot, Google, 2017*

Audience

The audience section helps you understand the characteristics of your audience, including their demographics, interests, behaviour (level of engagement). The mix of new and returning users and how their behaviour differs, and the browsers, networks and mobile devices they are using to access your site.



Figure 21.4.4: Part of Google's Audience overview tab *Adapted from Screenshot, Google, 2017*

Acquisition

Acquisition lets you compare traffic from search, referrals, email, and marketing campaigns. It shows you which sources drive the most traffic to your site.

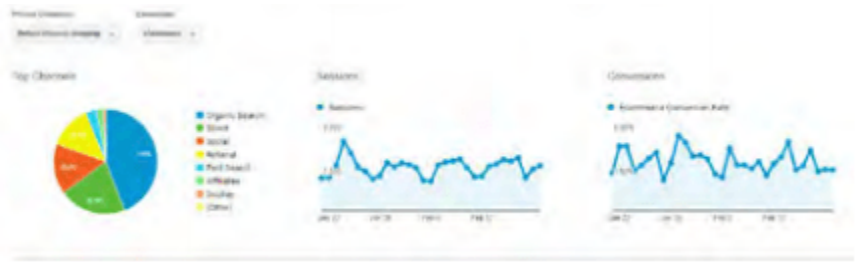


Figure 21.4.5: Part of Google's Acquisition overview tab *Adapted from Screenshot, Google, 2017*

Behaviour

This section shows how users interact with your content, how the content performs, its searchability and its interactivity. You can see how fast your pages load, how successful users are when searching the site, how any interactive elements on your site are

being used, popular content, which pages drive revenue, and more.



Figure 21.4.6: Part of Google's Behaviour overview tab *Adapted from Screenshot, Google, 2017*

Conversions

Conversions does exactly what it says on the box, it shows you how users are converting on your site. You can look at:

- The Goals tab, which shows how well your site meets business objectives
- The eCommerce tab, which shows what your visitors buy and can link it to other data to show what drives your revenue
- Multi-channel funnels, which shows how your channels work together to generate sales and conversions (for example, if a customer sees a display ad about your brand, visits your site to do research, and later does a search for a specific product before converting)
- Attribution, which shows you how traffic from various channels converts.



Figure 21.4.7: Part of Google's Goals overview in the Conversions tab *Adapted from Screenshot, Google, 2017*

Note

You can play around on Google's Analytics site using their free demo account, here: https:// analytics.google. com/analytics/ web/ demoAccount.

The type of information captured

By now, you should know the difference between objectives, goals, KPIs, and targets. KPIs are what you'll be focusing on when you measure data that has been captured.

KPIs are the metrics that help you understand how well you are meeting your objectives. A metric is a defined unit of measurement. Definitions can vary between various web analytics vendors depending on their approach to gathering data, but the standard definitions are provided here.

Web analytics metrics are divided into:

- **Counts**: These are the raw figures that will be used for analysis.
- **Ratios**: These are interpretations of the data that is counted.

Metrics can be applied to three different groupings:

- **Aggregate**: All traffic to the website for a defined period of time.
- **Segmented**: A subset of all traffic according to a specific filter, such as by campaign (PPC) or visitor type (new visitor vs. returning visitor).
- **Individual**: The activity of a single visitor for a defined period of time.

Here are some of the key metrics you will need to get started on with website analytics.

Building-block terms

These are the most basic web metrics. They tell you how much traffic your website is receiving. For example, looking at returning visitors can tell you how well your website creates loyalty; a website needs to grow the number of visitors who come back. An exception may be a support website where repeat visitors could indicate that the website has not been successful in solving the visitor's problem. Each website needs to be analysed based on its purpose.

- **Traffic**: The number of users that visit a website
- **Page**: Unit of content (so downloads and Flash files can be defined as pages).
- **Page views**: The number of times a page was successfully requested.
- **Session**: An interaction by an individual with a website consisting of one or more page views within a specified period of time.
- **Unique visitors**: The number of individual users visiting the website one or more times within a set period of time. Each individual is counted only once.
- **New visitor**: A unique visitor who visits the website for the first time ever in the period of time being analysed.

Note

New visitors show that you are reaching new audiences and markets, while returning visitors are an indicator of brand loyalty. Most websites should aim for a healthy balance between the two.

- **Returning visitor**: A unique visitor who makes two or more visits (on the same device and browser) within the time period being analysed.



Figure 21.4.8: A breakdown of new versus returning visitors in Google Analytics *Adapted from Screenshot, Google, 2017*

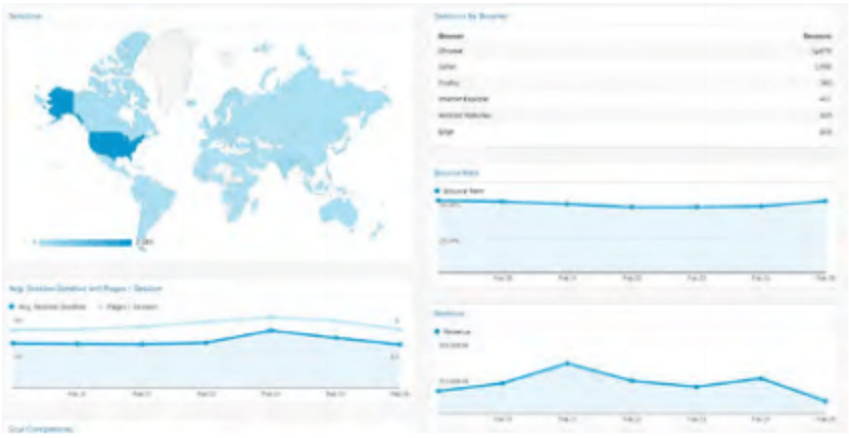


Figure 21.4.9: A dashboard showing some important KPIs for an eCommerce page *Adapted from Screenshot, Google, 2017*

Visit characteristics

These are some of the metrics that tell you how visitors reach your website, and how they move through the website. The way that a visitor navigates a website is called a click path. Looking at the referrers, both external and internal, allows you to gauge the click path that visitors take.

- **Entry page**: The first page of a visit.
- **Landing page**: The page intended to identify the beginning of the user experience resulting from a defined marketing effort.
- **Exit page**: The last page of a visit.
- **Visit duration**: The length of time in a session.
- **Referrer**: The URL that originally generated the request for the current page.
- **Internal referrer**: A URL that is part of the same website.
- **External referrer**: A URL that is outside of the website.
- **Search referrer**: A URL that is generated by a search function.
- **Visit referrer**: A URL that originated from a particular visit.
- **Original referrer**: A URL that sent a new visitor to the website.
- **Clickthrough**: The number of times a link was clicked by a visitor.
- **Clickthrough rate**: The number of times a link was clicked divided by the number of times it was seen (impressions).
- **Page views per visit**: The number of page views in a reporting period divided by the number of visits in that same period to get an average of how many pages being viewed per visit.



Figure 21.4.10: Referrer information on the Acquisitions page of Google Analytics *Adapted from Screenshot, Google, 2017*

Content characteristics

When a visitor views a page, they have two options: leave the website, or view another page on the website. These metrics tell you how visitors react to your content. Bounce rate can be one of the most important metrics that you measure. There are a few

exceptions, but a high bounce rate usually means high dissatisfaction with a web page.

> **Note**
>
> A high bounce rate is not always bad. On a blog, for example, most users click through from a search to read one article and, having satisfied their curiosity, leave without visiting any other pages.

- **Page exit ratio**: Number of exits from a page divided by total number of page views of that page
- **Single page visits**: Visits that consist of one page, even if that page was viewed a number of times
- **Bounces (or single page view visits)**: Visits consisting of a single page view
- **Bounce rate**: Single page view visits divided by entry pages.
- **Conversion metrics**: These metrics give insight into whether you are achieving your analytics goals (and through those, you overall website objectives).
- **Event**: A recorded action that has a specific time assigned to it by the browser or the server.
- **Conversion**: A visitor completing a target action.



Figure 21.4.11: Goal conversions in Google Analytics *Adapted from Screenshot, Google, 2017*

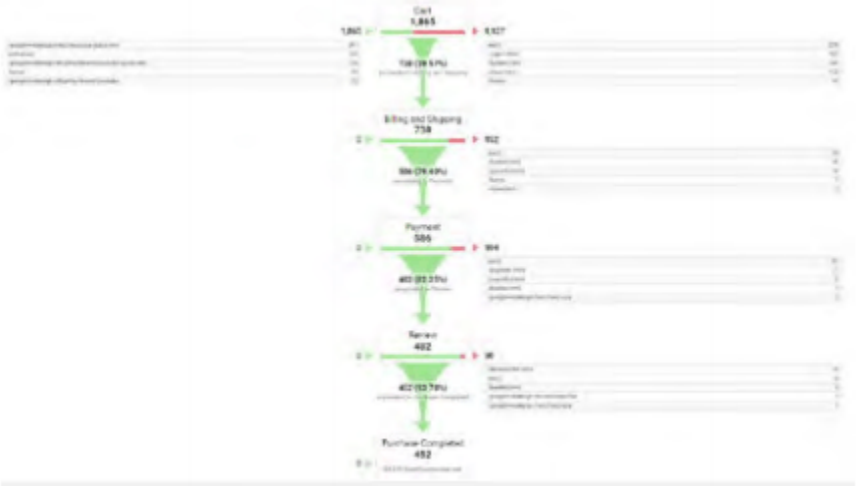


Figure 21.4.12: Funnel visualisation on Google Analytics *Adapted from Screenshot, Google, 2017*

Mobile metrics

When it comes to mobile data, there are no special, new or different metrics to use. However, you will probably be focusing your attention on some key aspects that are particularly relevant here namely, technologies and the user experience.

> **Note**
>
> Why do you think Google Analytics has a separate category for tablets, rather than including them under mobile devices?

- **Device category**: Whether the visit came from a desktop, mobile or tablet device
- **Mobile device info**: The specific brand and make of the mobile device
- **Mobile input selector**: The main input method for the device (such as touchscreen, click wheel, stylus)
- **Operating system**: The OS that the device uses to run, sch as iOS or Android.



Figure 21.4.13: Mobile device information on Google Analytics *Adapted from Screenshot, Google, 2017*

Now that you know what tracking is, you can use your objectives and KPIs to define what metrics you'll be tracking. You'll then need to analyse these results, and take appropriate actions. Then the testing begins again!

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21.5: Analysing data

> Note
>
> Google Analytics can send you email alerts whenever something unusual happens on your website. Simply set a triggering condition and decide what sort of report you want to receive. For example, you may want to know when more than a certain number of users have accessed your site in one day as this could mean an opportunity to capitalise on high traffic.

In order to test the success of your website, you need to remember the TAO of conversion optimisation.

Track – Analyse – Optimise

A number is just a number until you can interpret it. Typically, it is not the raw figures that you will be looking at, but what they tell you about how your users are interacting with your website. Because your web analytics package will never be able to provide you with 100% accurate results, you need to analyse trends and changes over time to truly understand your brand's performance.

Key elements to analyse

Avinash Kaushik, author of Web Analytics: An Hour a Day, recommends a threepronged approach to web analytics:

1. Analysing **behaviour** data infers the intent of a website's visitors. Why are users visiting the website?
2. Analysing **outcomes** metrics shows how many visitors performed the goal actions on a website. Are visitors completing the goals we want them to?

> Note
>
> Read more about this in the User experience design chapter.

3. A wide range of data tells us about the **user experience**. What are the patterns of user behaviour? How can we influence them so that we achieve our objectives?

Behaviour

Web users' behaviour can indicate a lot about their intent. Looking at referral URLs and search terms used to find the website can tell you a great deal about what problems visitors are expecting your site to solve.

Some methods to gauge the intent of your visitors include:

- **Click density analysis**: Looking at a heatmap to see where users are clicking on the site and if there are any noteworthy 'clumps' of clicks such as many users clicking on a page element that is not actually a button or link.
- **Segmentation**: Selecting a smaller group of visitors to analyse, based on a shared characteristic for example, only new visitors, only visitors from France, or only visitors who arrived on the site by clicking on a display advert. This lets you see if particular types of visitors behave differently.
- **Behaviour and content metrics**: Analysing data around user behaviours for example, time spent on site, number of pages viewed, can give a lot of insight into how engaging and valuable your website is. Looking at content metrics will show you which pages are the most popular, which pages users leave from most often, and more providing excellent insight for your content marketing strategy, as well as discovering what your audience is really interested in.

Note

Analytics data cannot give you a definitive answer to why users behave a certain way. It does provide plenty of clues about intent, it's up to you to put the pieces together.

A crucial, often-overlooked part of this analysis is internal search. Internal search refers to the searches of the website's content that users perform on the website. While a great deal of time is spent analysing and optimising external search such as using search engines to reach the website in question, analysing internal search goes a long way to exposing weaknesses in site navigation, determining how effectively a website is delivering solutions to visitors, and finding gaps in inventory on which a website can capitalise.

Consider the keywords a user may use when searching for a hotel website, and keywords they may use when on the website.

Keywords to search for a hotel website may be:

- Cape Town hotel
- Bed and breakfast Cape Town.

Once on the website, the user may use the site search function to find out more. Keywords they may use include:

- Table Mountain
- Pets
- Babysitting service.

Analytics tools can show what keywords users search for, what pages they visit after searching, and, of course, whether they search again or convert.



Figure 21.5.1: Site search information on Google Analytics *Adapted from Screenshot, Google, 2017*

Outcomes

At the end of the day, you want users who visit your website to perform an action that increases your revenue. Analysing goals and KPIs indicates where there is room for improvement. Look at user intent to establish if your website meets users' goals, and if these match with the website goals. Look at user experience to determine how outcomes can be influenced.

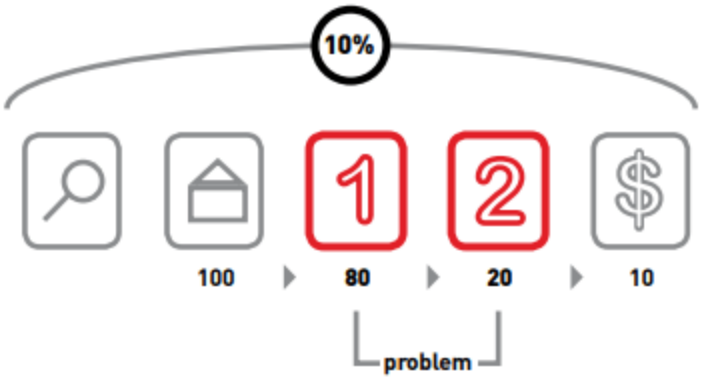


Figure 21.5.2: Reviewing conversion paths can give you insight into improving your website *Adapted from Stokes, 2013*

After performing a search, 100 visitors land on the home page of a website. From there, 80 visitors visit the first page towards the goal. This event has an 80% conversion rate. 20 visitors take the next step. This event has a 25% conversion rate. Ten visitors convert into paying customers. This event has a 50% conversion rate. The conversion rate of all visitors who performed the search is 10%, but breaking this up into events lets us analyse and improve the conversion rate of each event.

User experience

To determine the factors that influence user experience, you must test and determine the patterns of user behaviour. Understanding why users behave in a certain way on your website will show you how that behaviour can be influenced to improve your outcomes. This is covered in the next chapter on Conversion optimisation.

Funnel analysis

Funnel analysis is crucial to understanding where problems in a conversion process lie, and helps you to track whether your website is achieving its ultimate goal. The process of achieving that goal can be broken down into several steps. These are called events or micro-conversions. Analysing each step in the process is called funnel analysis or path analysis.

For example, on a hotel booking website, the ultimate goal is that visitors to the site make a booking on the website with a credit card.

Each step in the process is an event that can be analysed as a conversion point.

Event 1: Perform a search for available dates for hotels in the desired area.

Event 2: Check prices and amenities for available hotels.

Event 3: Select a hotel and go to checkout.

Event 4: Enter personal and payment details and confirm booking (conversion).

One naturally expects fewer users at each step. Increasing the number of visitors who progress from one step to the next will go a long way to improving the overall conversion rate of the site.

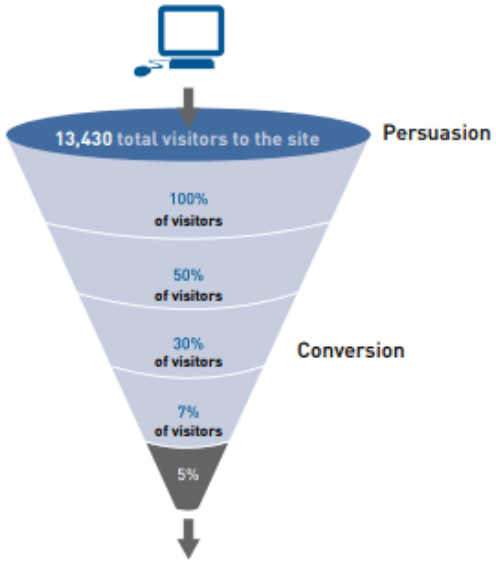


Figure 21.5.3: A conversion funnel *Adapted from Stokes, 2010*

Note

Here are some examples of possible objectives, goals and KPIs for different websites.

Hospitality eCommerce site, such as www.expedia.com

- **Objective**: Increase bookings
- **Objective**: Decrease marketing expenses
- **Goal**: Make a reservation online
- **KPIs**:
  - Conversion rate
  - Cost per visitor
  - Average order value.

News and content sites, such as www.news24.com

- **Objective**: Increase readership and level of interest
- **Objective**: Increase time visitors spend on website
- **Goal**: A minimum time on site
- **KPIs**:
  - Length of visit
  - Average time spent on website
  - Percentage of returning visitors.

KPIs help you to look at the factors you can influence in the conversion process. For example, if your objective is to increase revenue, you could look at ways of increasing your conversion rate, that is, the number of visitors who purchase something on your site. One way of increasing your conversion rate could be to offer a discount. So, you would have more sales, but probably a lower average order value. Or, you could look at ways of increasing the average order value, so that the conversion rate would stay the same, but you would increase the revenue from each conversion.

Once you have established your objectives, goals and KPIs, you need to track the data that will help you to analyse how you are performing, and will indicate how you can optimise your website or campaign.

Segmentation

Every visitor to a website is different, but there are some ways in which we can characterise groups of users, and analyse metrics

for each group. This is called segmentation.

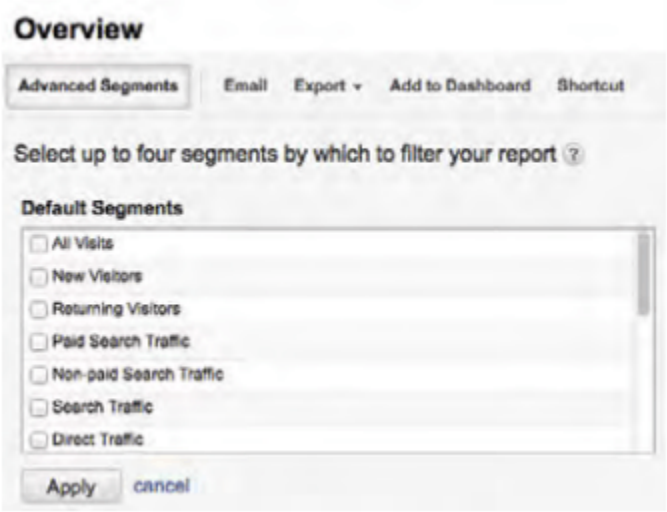


Figure 21.5.4: Default segments in Google Analytics *Adapted From Screenshot, Google, 2017*

Some segments include:

Referral source

Users who arrive at your site via search engines, those who type in the URL directly, and those who come from a link in an online news article are all likely to behave differently. As well as conversion rates, click path and exit pages are important metrics to consider. Consider the page that these visitors enter your website from, can anything be done to improve their experience?

Landing pages

Users who enter your website through different pages can behave very differently. What can you do to affect the page on which they are landing, or what elements of the landing page can be changed to positively influence outcomes?

Connection speed, operating system, browser

Consider the effects of technology on the behaviour of your users. A high bounce rate for low-bandwidth users, for example, could indicate that your site is taking too long to load. Visitors who use open source technology may expect different things from your website to other visitors. Different browsers may show your website differently, how does this affect these visitors?

Geographical location

Do users from different countries, provinces or towns behave differently on your website? How can you optimise the experience for these different groups?

First-time visitors

How is the click path of a first-time visitor different from that of a returning visitor? What parts of the website are most important to first-time visitors?

In-page heat maps

Software such as Crazy Egg (www.crazyegg.com) can show you exactly where users click on a web page, regardless of whether they are clicking on links or not.



Figure 21.5.5: Heat map options offered by Crazy Egg *Adapted From Designmodo, 2014*

It produces information that helps you to know which areas of a website are clickable, but which attract few or no clicks, and which areas are not clickable but have users attempting to click there. This can show you what visual clues on your web page influence where your visitors click, and this can be used to optimise the click path of your visitors.

There are many factors that could be preventing your visitors from achieving specific end goals. From the tone of the copy to the colour of the page, anything on your website may affect conversions. Possible factors are often so glaringly obvious that one tends to miss them, or so small that they are dismissed as trivial. Changing one factor may result in other unforeseen consequences and it is vital to ensure that you don't jump to the wrong conclusions.

Hotjar (www.hotjar.com) another popular analytics tool, demonstrates how heatmaps can help you improve your web page. You can find more information here: https://www.hotjar.com/heatmaps

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21.6: Data Visualisation

In the Data-driven decision making chapter, we discussed the importance of reporting on data and making sure that the information gets to the right users, in the right way. Not everyone is adept at understanding a detailed financial breakdown, and analytics reports often intimidate people, so how can a data-focused marketer present information in a way that's accessible to everyone?

The answer lies in data visualisation, which involves placing data in a visual context to help users understand it. Data visualisation software can help demonstrate patterns and trends that might be easily missed in purely text-based data reporting. It can refer to something as simple as an infographic, or something as complex as a multi-point interactive program that lets users decide what to compare.

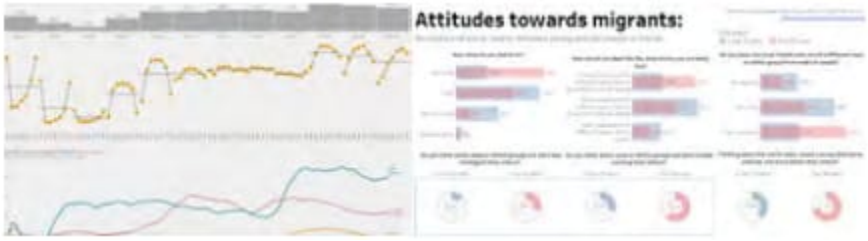


Figure 21.6.1: Traditional graphs and charts to represent data. *Adapted From Public Tableau, 2017*

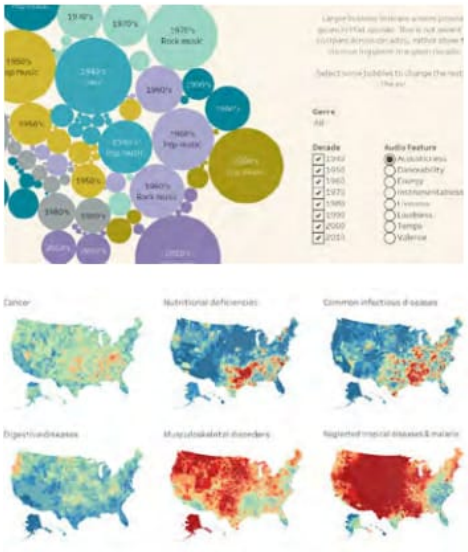


Figure 21.6.2: Representing data in different ways *Adapted From Public Tableau, 2017*

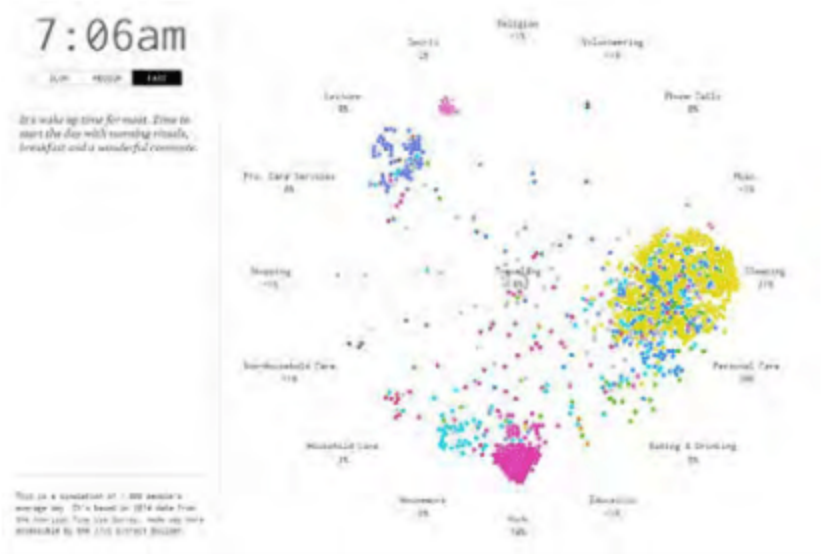


Figure 21.6.3: Clever use of the layout of a clock and plotting points for representing what Americans spend their time doing each day *Adapted From Scribble Live, 2015*



Figure 21.6.4: Word clouds are becoming popular ways to visualise data, where the size of the word represents its importance or frequency *Adapted From Peekaboo, 2012*

Many data visualisation online are also interactive. Visit this link to see an interactive data visualisation about voting habits of Americans: https:// www.nytimes.com/interactive/2016/06/10/upshot/voting-habits-turnoutpartisanship.html

For a good lesson in data visualisation, including how to start using it, check out this article from SAS: Data Visualization: What it is and why it matters - https:// www.sas.com/en_za/insights/big-data/data-visualization.html.

It can be challenging to decide on what data you want to visualise and the information you want to communicate, but as long as you know how your audience is likely to process visual information and what they need to know, you should be able to choose something that conveys the necessary information simply.

Note

For some tips on how to begin with data visualisation, take a quick look at some tools and some more resources on the topic. The Guardian actually has a remarkably useful article: https:// www.theguardian.com/ global-developmentprofessionalsnetwork/2014/ aug/28/interactiveinfographicsdevelopment-data

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21.7: Tools of the trade

The first thing you need is a web analytics tool for gathering data. Some are free and some need to be paid for. You will need to determine which package best serves your needs. Bear in mind that if you switch vendors, you may lose historical data. Below are some leading providers:

- Google Analytics – www.google.com/analytics
- AWStats – awstats.sourceforge.io
- Webalizer – www.webalizer.org
- Hotjar – www.hotjar.com
- GoSquared – www.gosquared.com
- Kissmetrics – www.kissmetrics.com
- Clicky – clicky.com

When it comes to running split tests, if you don't have the technical capacity to run these in-house, there are some third-party services that can host them for you.

Google Optimize, which you would have learnt about in the Conversion optimisation chapter is Google's platform for running tests and assessing your website's performance.

A test the significance of basic split tests, a split-test calculator is available at: www.usereffect.com/split-test-calculator. When you use cookie-based tracking, you need to add code tags to your web pages and these need to be maintained, updated and changed occasionally. Google Tag Manager (www.google.com/ tagmanager) makes it easy to add and work with these tags without requiring any coding knowledge. Other professional tag management tools include TagMan (www. tagman.com), Ensighten (www.ensighten.com) and Tealium (www.tealium.com).

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21.8: Advantages and challenges

Tracking, analysing and optimising is vital to the success of all marketing efforts. Digital marketing allows easy and fast tracking, and the ability to optimise frequently. When you use real data to make decisions, you're likely to make the best choices for your business and website.

However, it can be easy to become fixated on figures and metrics, instead of looking at broader trends and using them to optimise campaigns. Generally, macro or global metrics should be looked at before analysing the micro elements of a website.

Testing variables is vital to success. Results always need to be statistically analysed, and marketers should let these numbers make the decisions. Never assume the outcome, wait for the numbers to inform you. The next chapter covers this in much more detail.

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21.9: Case study - eFinancialCareers

One-line summary

eFinancialCareers, the world's leading financial services careers website, used Google Analytics 360 and DoubleClick Manager to improve its programmatic display remarketing.

The challenge

eFinancialCareers uses dynamic remarketing ads to drive leads to its site, where their goal – the major conversion they hope for – is for the user to fill out a job application. The company wanted to boost the number of conversions coming to them from programmatic ads.

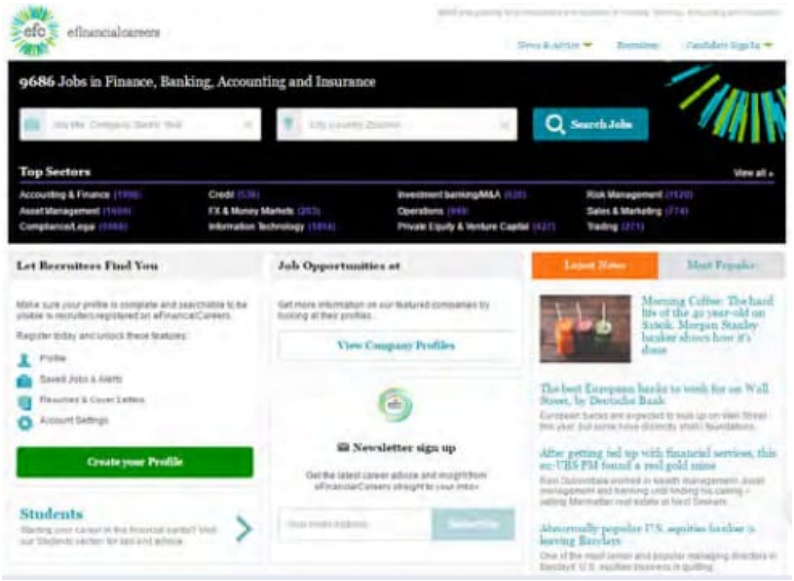


Figure 21.9.1: The eFinancialCareers website *Adapted From Screenshot, eFinancial careers, 2017*

The solution

With help from Google 360 experts Periscopix, they decided to gather and analyse insights about site visitors, including behavioural, demographic, and geographic information.

They set up event tracking for a number of variables, including:

- Country
- Job sector
- City
- Company
- Job ID number.

After collecting data about their website users for six weeks, they segmented them into:

- Passive users, who have visited the website and potentially registered for job updates, but haven't viewed or applied for any jobs.
- Active users, who have viewed and applied for jobs.

Once they had this data about each segment, they could tailor programmatic remarketing ads to send the right message to

individual users. Messages could encourage passive users to apply for vacancies, while active users could be sent tailored ads based on information such as the job sector in which they had displayed interest.

They created almost 300 different remarketing lists, adding layers of detail to each identified segment.

Because Analytics 360 and DoubleClick can be integrated, updated remarketing lists can be automatically passed to DoubleClick to ensure relevant targeting for programmatic ads.

The results

Because the new system allowed remarketing to reach users within the ideal conversion period, and with relevant messaging that was updated based on the user's site activity, the ads performed considerably better. eFinancialCareers saw:

- A 21% increase in site traffic from real-time bidding campaigns
- A 423% increase in conversion rates for job applications coming from remarketing efforts.

(Google, 2016)

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21.10: The bigger picture

Tracking, analysing and optimising are fundamental to any digital marketing activity, and it is possible to track almost every detail of any online campaign.

Most analytics packages can be used across all digital marketing activities, allowing for an integrated approach to determining the success of campaigns. While it is important to analyse each campaign on its own merits, the Internet allows for a holistic approach to these activities. The savvy marketer will be able to see how campaigns affect and enhance each other.

The data gathered and analysed can provide insights into the following fields, among others:

- SEO: What keywords are users using to search for your site, and how do they behave once they find it?
- Email: When is the best time to send an email newsletter? Are users clicking on the links in the newsletter and converting on your website?
- Paid media: How successful are your paid advertising campaigns? How does paid traffic compare to organic search traffic?
- Social media: Is social media driving traffic to the website? How do fans of the brand behave compared to those who do not engage socially?
- Mobile: How much of your traffic comes from mobile devices? Is it worth optimising your site for these? (It usually is!)

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21.11: References

Google, 2016. Google Analytics 360 and DoubleClick Bid Manager boost conversions by 423%. [Online] Available at: services.google.com/fh/files/misc/ga360_efinancialcareers_case_study_v3.pdf [Accessed 6 November 2017]

Krux, 2016. Data Mining Is Becoming The New Market Research. [Online] Available at: www.krux.com/blog/general/data-mining-is-becoming-the-new-market-research [Accessed 23 February 2017] - Link no longer active

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21.E: Data Analytics(Exercises)

Case study questions

1. Why did eFinancialCareers create so many remarketing lists?
2. Describe what analytics data was gathered to create these lists. Why did they choose to focus on this data?
3. How did the integration of various digital elements improve this brand's remarketing efforts?

Chapter questions

1. Why is it so important to use data to inform business decisions?
2. What would you learn from a single-page heat map?
3. What is the difference between a goal and a KPI?

Further reading

www.kaushik.net/avinash – Avinash Kaushik is an analytics evangelist, and his regular insight on his blog, Occam's Razor, is essential reading for any digital marketer.

Web Analytics 2.0 by Avinash Kaushik – if you are looking to get started in web analytics, you can't go wrong with this book by the web analytics legend.

www.analyticspros.com/blog – Analytics Pros has a blog with great advice and thoughts about analytics.

blogs.adobe.com/digitalmarketing – Adobe has a good blog with a lot of analytics information as well.

contentmarketinginstitute.com/?s=analytics – Believe it or not, the Content Marketing Institute has some great analytics tips.

support.google.com/analytics#topic=3544906 – Google Analytics Help Center is an excellent starting point for anyone who wants to get to grips with this free, excellent web analytics service.

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21.S: Data Analytics(Summary)

The ability to track user behaviour on the Internet allows you to analyse almost every level of a digital campaign, which should lead to improved results over time. The foundation of successful web analytics is to determine campaign and business objectives upfront and to use these to choose goals and KPIs grounded in solid targets.

Web analytic packages come in two flavours – server-based and cookie-based tracking – although some packages combine both methods.

Data can be analysed to discover how users behave, whether outcomes have been achieved, and how appealing the user experience is. Testing to optimise user experience can demonstrate ways in which to influence user behaviour so that more successful outcomes can be achieved. segmenting the audience allows specific groups of users to be analysed.

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22: APPENDIX - UNDERSTANDING THE INTERNET

There is no doubt about it: the Internet has changed the world we live in. Never before has it been so easy to access information, communicate with people all over the globe, and share articles, videos, photos and all manner of media. The Internet has led to an increasingly connected communications environment, and the growth of Internet usage has resulted in declining distribution of traditional media such as television, radio, newspapers and magazines.

Digital marketing embraces a wide range of strategies, but what underpins its success is a user-centric and cohesive approach. Over the past few decades, marketers have begun to wake up to the power of the Internet, both as a platform for communication and as a way of tracking conversations. By its very nature, the Internet is a network of interlinking nodes. Marketers use these nodes to track conversations and behaviour patterns.

22.1: History of the Internet

22.2: How the Internet works

22.3: How people access the Internet

22.4: What does this have to do with marketing?

22.5: References

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22.1: History of the Internet

1958	US ARPA (Advanced Research Projects Agency) established to lead science and military technological developments.
1961	MIT research paper on Packet Switching Theory.
1961-69	Ongoing research into inter-computer communications and networks.
1969	ARPANET, commissioned by US Defense Department, goes live. US universities connect up network facilities for the first time.
1971	Ray Tomlinson creates first network email application.
1973	Development of protocols to enable multi-network Internet opportunities. First international ARPANET connections made.
1976	HM Queen Elizabeth II sends an email.
1978	First spam email is recorded.
1980	Tim Berners-Lee develops rules for the World Wide Web and is credited as the Web Father. Alan Emtage develops the first search tool, known as 'ARCHIE'.
1982	Standard network protocols are established: Transmission Control Protocol (TCP) and Internet Protocol (IP), commonly referred to as TCP/IP.
1984	Joint Academic Network (JANET) is established, linking higher education institutions. Domain Name System (DNS) is introduced.
1985	A company named Symbolics becomes the first registered dot-com domain.
1987	National Science Foundation (US) is the catalyst for the surge in funded work into the Internet. Number of Internet hosts increases significantly in this period.
1988-90	28 countries sign up to hook up to the NSFNET, reinforcing international Internet potential.
1990	Senator Al Gore coins the term 'information superhighway'.
1991	Web Father Tim Berners-Lee releases World Wide Web (www) with scientists from CERN.
1992	America Online (AOL) is launched and raises $23m in floatation. The term 'surfing the net' is introduced by Jean Armour Polly. The World Bank goes online.
1993	Mainstream media attention increases awareness of the Internet. The first Internet publication, Wired, goes on sale. Mosaic introduces the first web browser with graphical interface and is the forerunner of Netscape Navigator. First online shopping malls and virtual banks emerge, as does evidence of spam. First clickable banner advert is sold by Global Network Navigator to a law firm.

1995	Amazon is launched by Jeff Bezos. Trial dial-up systems such as AOL and CompuServe launch. Charging is introduced for domain names. Search technology companies such as Alta Vista, Infoseek, Excite and Metacrawler rapidly appear.
1996	Yahoo! is launched on the stock exchange and shares are up nearly 300% on first day.
1997	MP3.com is founded. The term ‘search engine optimisation’ is used for the first time in a forum.
1998	XML is released to enable compatibility between different computer systems. Google founded by Larry Page and Sergey Brin.
1999	Peter Merholz coins the word ‘blog’.
2000	AOL and Time-Warner announce that they are merging. Pay-per-click campaigns are introduced for top ten search rankings. Google AdWords launches, charging for adverts on a CPM basis.
2002	UK online monthly consumer shopping breaks through the £1 billion barrier. Google AdWords charges on a PPC basis instead of CPM.
2003	eBay topples Amazon as the most visited UK website.
2004	CD-WOW loses court case and rights to source cheaper CDs outside EU, undermining the global concept of the Internet. Facebook launches from the Harvard dorm room of Mark Zuckerberg, Dustin Moskovitz, Chris Hughes and Eduardo Saverin.
2005	Iceland leads the world with broadband penetration: 26.7 inhabitants per 100 have broadband compared with 15.9 per 100 in the UK. YouTube launches. Google buys Android Inc.
2006	Google buys YouTube for $1.6 billion. Facebook membership opens to everyone. Twitter launches. Technorati notes that a blog is created every second of every day. TIME Magazine names ‘You’ as person of the year, as a result of online activity.

2007	Facebook launches Facebook Ads. Apple launches the iPhone. The Google Phone, with the Android operating system, launches. Google launches Gmail.
2008	Firefox 3.0 launches with over 8 million downloads in 24 hours. Groupon launches, to become the fastest growing company of all time. Google Chrome, a browser, launches. Apple opens the App Store.
2009	Facebook adds the 'like' feature. Foursquare launches.
2010	Facebook reaches 500 million users. 24 hours of video are uploaded to YouTube every minute. Pinterest launches. Apple releases the first iPad. Google launches Nexus One. The number of Internet users tops 1.9 billion worldwide. Instagram launches. Astronaut TJ Creamer sends the first tweet from space.
2011	200 million tweets are sent daily on Twitter – about one billion a week. Social media is credited with a crucial role in political movements in Egypt, Tunisia and Libya. Apple's App Store downloads top 10 billion. Google+ launches. YouTube reaches 1 trillion views.

2012	Facebook tops 1 billion users. Apple releases the iPad Mini. The number of Internet users tops 2.4 billion worldwide. Online advertising spend surpasses print advertising spend for the first time. Facebook buys Instagram for $1 billion, as the service tops 100 million active users.
2013	Video-sharing service, Vine, launches. Smartphone sales overtake feature phone sales globally. 100 hours of video are uploaded to YouTube every minute. Over 45 billion apps have been downloaded from the Apple App Store.
2014	Number of Internet users hits 3 billion. Facebook buys messaging app WhatsApp for US $19 billion. Facebook introduces autoplay videos and provides video metrics as part of its native analytics package for brands and businesses.
2015	Smartphones become the most popular device used to browse the Internet. WordPress powers 25% of websites. The use of mobile banking and payment apps rises by 54%.
2016	The Internet of Things (IoT) gains momentum. From wearables to smart homes, increasingly things are becoming connected online.
2017	Facebook hits 2 billion active monthly users. Big data and AI continue to change how we conduct business. Gaming becomes a 2.6 billion US$ dollar industry and voice begins to replace typing for online queries.



Figure 22.1.1: Internet activity in one minute in 2017 *Adapted From Visual capitalist, 2017.*

Note

What new developments have happened recently? Keep an eye on the news for digital updates.

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22.2: How the Internet works

In its simplest form, the Internet is a collection of documents connected by hyperlinks.

A hyperlink is a virtual link from one document on the World Wide Web to another. It includes the Uniform Resource Locator (URL) of the linked-to document, which describes where on the Internet a document is. It is what you enter in the address bar of the browser, because it is the address of that document on the Internet.

A URL provides information to both browsers and people. URLs include domain names that translate to Internet Protocol (IP) addresses. Every website corresponds to an IP address, which is a structured series of dots and numbers indicating where it is physically located. In fact, every device on the network has an IP address.

When you enter a URL into the address bar of a browser, the Domain Name System (DNS) record indicates where the document you are linking to is.

Confused? Look at the domain name and IP address for Red & Yellow's website:

Domain name: www.redandyellow.co.za

IP address: 212.100.243.204

A domain name looks something like this: www.domainname.com.

But a lot more information can be included in this. URLs can carry the following information: subdomain.domain.tld/directory

Domain – the registered domain name of the website.

Subdomain – a domain that is part of a larger domain.

TLD – the top level domain, uppermost in the hierarchy of domain names.

Directory – a folder to organise content.

The TLD can indicate the country in which a domain is registered, and can also give information about the nature of the domain.

.com – the most common TLD.

.co.za, .co.uk, .com.au – these TLDs give country information.

.org – used by non-profit organisations.

.gov – used by governments.

.ac – used by academic institutions.

Domain names must be registered, and there is a fee for doing so.

A website, or any content on the Internet, is hosted on a server. A web server is a machine that serves web content, and the term often refers to the software (applications) and the hardware (machine) that serve the content.

Very simplistically, it works a little something like this:

1. Someone enters a URL in a browser.
2. This is translated into an IP address, which indicates where the content is located, or where the server for the content is.

Note

All of this happens in a fraction of a second!

3. The server then returns the content requested.
4. The person sees the website that they requested.

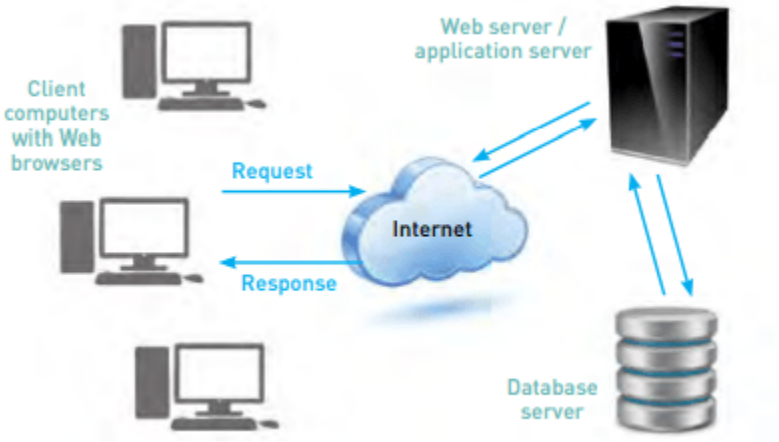


Figure 22.2.1: The process of serving a website *Adapted From Stokes, 2013*

Sometimes, the server is not able to fulfil the request meaning it cannot return the content requested, and instead it returns a status code. Two common status codes you will encounter in this book are below.

301: This is used to indicate that the content requested has moved permanently, and the new version of the content is returned instead. These 301 redirects are often used in search engine optimisation (SEO) or when a new website is launched to make sure that old links are redirected to the correct, new content.

404: This is returned when the content has not been found on the server, either because there was an error in the link, or because the content has been moved or deleted. Website owners can design a custom page for when a 404 error occurs, giving users useful information.



Figure 22.2.2: A fun custom 404 page from Lego *Adapted From Creative blog, 2017*

You can find a full list of status codes at www.w3.org/Protocols/rfc2616/rfc2616- sec10.html.

This information can be sent via Hypertext Transfer Protocol (HTTP), or HTTPS, which is a combination of HTTP with a secure way of transmitting information.

Note

How aware are you of security when browsing the web? Pay close attention to the sites that use secure protocols, what does this say about them?

HTTP makes it easy to request and transfer information. It's what makes our websites load, and allows us to connect with people on social networks. However, the information that is transferred is not transferred securely, meaning that it could be viewed by third parties. If this was the only way of sending information online, it would be a bad idea to bank online, or to purchase anything over the Internet.

This is why we use HTTPS to encrypt information when it is sensitive. In order to make use of HTTPS, the relevant website needs to get a security certificate, which ensures that various details have been verified by a trusted third party.

If you're unsure, look in the browser address bar to check whether the site you are on is HTTP or HTTPS. Most browsers will indicate a secure site with a little padlock in the address bar, or somewhere else in the browser, to make sure that you know you are in a secure site.



Figure 22.2.3: Indicators of a secure site *Adapted From Screenshot, Google, 2017*

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22.3: How people access the Internet

People connect to the Internet and access content in many different ways. When it comes to the physical connection to the Internet, the market presents a number of options:

- **Dial-up**
- **3G and 4G connection**
- **Wi-Fi and WiMAX**
- **Broadband**
- **ADSL.**

The list goes on. The devices people use vary from mobile phones and expensive tablets to personal notebooks and desktop computers. The environment that people are in when they access the Internet also differs:

- **At home**
- **At the office or place of work**
- **At libraries and education centres**
- **In Internet cafes and coffee shops**
- **On the go.**

Not only do these environmental factors affect how people use the Internet, but their reasons for using the Internet also have an effect on how they interact online.

For some people, the Internet is primarily a communications channel, and their online activity is focused on social media or their email inbox, while for others it may be a research channel, with search engines playing a large role in their online experience.

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22.4: What does this have to do with marketing?

Marketing is about conversations, and the Internet facilitates these on a global scale. The rest of this book has covered the tools and tactics you need to understand and use the Internet to its full potential.

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GLOSSARY

A

A/B test | Also known as a split test, it involves testing two versions of the same page or site to see which performs better.

Above the fold | The content that appears on a screen without a user having to scroll.

Accessibility | The degree to which a website is available to users with disabilities, such as the visually or hearing impaired, and those technically disadvantaged by not having the necessary device, software or browser.

Active verb | A word that conveys action or behaviour, and in a ll to action , tells a reader what to do.

Ad Server | The technology that places ads on websites.

Ad Types | The kind of ads you can create on social media; these could be Twitter Cards, Facebook sponsored posts or, Lenses or Geofilters on Snapchat.

Adaptive web design | Websites that respond to a user's screen size by loading predefined layouts.

Ads manager | An online dashboard provided by Facebook where one can view, edit, and access performance reports for campaigns, ad sets and individual ads. With Ads Manager you can view all your Facebook campaigns, track your payment history, make changes to your bids and budgets, export ad performance reports, and pause or restart your ads.

Algorithm | An algorithm is a mathematical, computational or statistical method pre-determined to take a number of variables into account and output a single, quantifiable result that is a function of all the variables. A good example of a commonly used algorithm is the one used by Google to determine which pages rank more highly on SERPs.

Alt text | The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. Also called alt tag. Anchor text is the visible, clickable text in a link.

Alt Text | The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a user what an image is about and displaying the text in instances where the image is unable to load. Also called alt tag.

Anchor text | A text link, or backlink, that refers visitors to your site from another with SEO benefits, passing relevance and authority from the referring site.

Animated GIF | A GIF (type of image file) which supports animations and allows a separate palette of 256 colours for each frame.

Annotation | A comment or instruction usually added as text, on a YouTube video. A YouTube annotation may contain links directing users to other pages within YouTube or, if a brand is willing to pay, to outside websites. These have been phased out as of 2017 and replaced with video cards.

App | Short for 'application', which in a mobile context, means software developed specifically for smartphones and other mobile devices. These come in two types, web apps and native apps.

App store optimisation (ASO) | The process of optimising mobile and web applications for the specific web stores in which they are distributed.

Attention economy | The idea that human attention is a scarce commodity i.e. seeing attention as a limited resource.

Audience | The group of people at which a marketing communication is targeted.

Augmented reality (AR) | A form of virtual reality in which computer graphics are superimposed onto the physical space around the user by way of a mobile device. These graphics can be 3D images or information tags.

Avatar | A manifested online identity on social media and other online communities. An Avatar can be whatever the user chooses and is the personal image the user wants to project to other users.

B

Backlink | All the links from pages on external domains pointing to pages on your own domain. Each link from an external domain to a specific page is known as an inbound/backlink. The number of backlinks influences your ranking, so the more backlinks the better, get linking!

Banner | An online advertisement in the form of a graphic image that appears on a web page, including mobile sites.

Benefit | The positive outcome for a user that a feature provides.

Blog | Short for weblog. A type of website that allows users (bloggers) to post entries and self-published musings on different topics and which often allows readers to comment on these posts.

Bluetooth | A short-distance wireless transfer protocol for connecting devices.

Boosted posts | A boosted post is a post such as status updates, photos, videos and offers, that will appear higher in news feeds so that more users will see the post. Posts can only be boosted from a brand or business page. Personal profiles cannot be boosted. The cost of a Boosted post depends on the number of users you want to reach.

Bounce | When users leave a site before navigating from their landing page to another.

Bounce rate | The number of people who view one page and then leave a website without viewing any other pages. Data statistics and facts collected for analysis.

Branding (or visual identity or corporate identity) | These terms refer to the look and feel of your brand. In this context it is used when discussing how your logo, colours and styling elements are translated from traditional print-based assets to digital.

Breadcrumbs | Links, usually on the top of each page, indicating where a page is in the hierarchy of the website. Breadcrumbs can be used to help users navigate through the website, as well as act as a page index for search engines.

Business intelligence/ insights | Data that can help businesses understand the factors influencing their success and how these can be used to benefit them.

Business-to-business | When businesses sell products or services to other businesses and not to consumers.

Business-to-consumers | When businesses sell products or services to consumers.

C

C2B | Consumer to business, where consumers sell products to business, such as freelance services.

C2C | Consumer to consumer, where consumers sell products directly to other consumers.

Cache | Files stored locally on a user's browser to limit the amount of data called from the server on a return visit.

Call to Action | A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today etc.). Calls to action are usually styled differently from other copy on a page so that they stand out and draw attention.

Canonical | In SEO, canonical refers to a definitive URL. The canonical version is the definitive version. Domain name**The easy-to-read name used to identify an IP address of a server that distinguishes it from other systems on the World Wide Web: our domain name is redandyellow.co.za.

Captions | Text that appears over a video that labels a scene, identifies a location or person, or narrates dialogue onscreen. Captions can be either open or closed.

Carousel ads | An ad form that allows the brand to show multiple images and/ or videos and a link to some action in a single ad. Up to 10 pieces of content can be included. Carousel ads have proven to be much more effective in driving traffic to advertisers' websites from social media platforms.

Cascading Style Sheets (CSS) | A programming language that defines the styles such as fonts and colours, used to display text and content. Web pages are one of the places that this language is used.

Chiclets | Social share buttons that appear as small icons adjacent to a blog post, image, article or web page which enable users to share the information via a social media platform, whose icon is indicated by the chiclet.

Churn rate | The annual percentage rate at which a business loses customers.

Cinemagraph | Online photographs, with elements that move, using looped video, published as an animated GIF, or other video format, to give the impression the viewer is watching an animation.

Click path | The journey a user takes through a website.

Clickthrough | A click on a text ad link that leads to a website.

Clickthrough rate | The total clicks on a link divided by the number of times that link was shown, expressed as a percentage.

Client-side | Scripts that run in a user's browser, rather than on a web server.

Cluetrain Manifesto | A set of 95 theses organised as a call to action (CTA) for businesses operating within a newly connected marketplace.

Common page elements | Items that appear on every page of a website.

Community guidelines | The rules and principles that community members must adhere to when communicating on a social media platform.

Community management | Community management is the building and monitoring of online communities generated from your brand's blogs, forums, social network pages, etc.

Connected customer | Consumers are increasingly connected, using ever-growing numbers of Internet-enabled devices. These offer opportunities for data collection.

Content | Any items you post online are considered content. This includes status updates, images, posts, videos and any copy. Good content should engage users and build your brand.

Content audit | An examination and evaluation of existing content on a website.

Content audit | An examination and evaluation of the existing content which a brand publishes.

Content Management System (CMS) | A software system that allows an administrator to update the content of a website, so that a developer is not required.

Content strategy | In this context, a plan that outlines what content is needed for a web project and when and how it will be created.

Convention | A common rule or tried-and-tested way in which something is done.

Conversion | Completing an action or actions that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.

Conversion funnel | A defined path that visitors should take to reach the final objective.

Conversion rate | The number of conversions divided by the number of visitors, expressed as a percentage.

Cookie | A small text files that are used to transfer information between browsers and web servers. They help web servers to provide the right content when it is requested.

Cookie | A small text file that is used to transfer information between browsers and web servers. They help web servers to provide the right content when it is requested.

Cost per acquisition (CPA) | Refers to the cost of acquiring a new customer. The advertiser pays only when a desired action is achieved (sometimes called cost per lead).

Cost per action (CPA) | The amount paid when a certain action is performed by a user.

Cost per click (CPC) | Refers to when an advertiser pays only when their ad is clicked on, giving them a visitor to their site typically from a search engine in pay-per-click search marketing or programmatic CPC buying engines.

Cost per mille/ thousand (CPM) | Amount paid for every 1 000 impressions served of an advertisement.

Count | Raw figures captured for data analysis.

Cover image | The main image on a social media page. It needs to catch the attention of the user, be consistent with your brand, and encourage the user to read more on the page and engage further with your brand.

Credibility | In this context, how trustworthy, safe and legitimate a website looks

Cross channel commerce | Strategic maximization of customer relationships beyond the initial engagement channel.

Crowdfunding | Funding a project or venture by raising financial contributions from a larger number of people. Kickstarter and Thundafund are examples of crowdfunding platforms that source funds for a variety of projects.

Crowdsourcing | Taking a job traditionally performed by a professional and distributing it to an undefined, generally large, group of people in the form of an open call.

Current indicators | Information from the present time that can help businesses to understand their customer and themselves.

Customer | A person who buys or uses goods or services, with whom a company should develop a relationship.

Customer centric | Placing the customer at the centre of an organisation's business planning and execution.

Customer experience map | A visual representation of the customers' flow from beginning to end of the purchase experience, including their needs, wants, expectations, and overall experience.

Customer intelligence | The process of gathering and analysing information about customers to improve customer relationships and allow for more strategic business decisions.

Customer lifetime value (CLV) | The profitability of a customer over their enti

Customer persona | A detailed description of a fictional person to help a brand visualise a segment of its target market.

Customer relationship management (CRM) | A strategy for managing a company's interactions with clients and potential clients. It often makes use of technology to automate the sales, marketing, customer service and technical processes of an organisation.

D

Data intelligence | The process of gathering and analysing data from all available sources to improve customer relationships and make more strategic business decisions.

Data mining | The process of analysing data to discover unknown patterns or connections.

Data sentiment analysis | The systematic analysis of subjective materials, such as survey responses or social media posts, in order to determine the attitude and intended emotional communication of the customer

Database | In email marketing, the database is the list of prospects to which emails are sent. It also contains additional information pertinent to the prospects.

Demographics | Statistical information about a particular population, such as age, gender, language or location.

Display network | Content websites that serve pay-per-click adverts from the same provider, such as AdWords.

Disruption | When a disruptive innovation changes the market and displaces established players.

Domain name system | DNS converts a domain name into an IP address. DomainKeys, an email authentication system designed to verify the DNS domain of an email sender and the message integrity.

Double opt-in | The act of getting subscribers to confirm their initial subscription via a follow-up email asking them to validate their address and hence opt-in again.

dpi | Dots per inch (in an image). On the web, the screen resolution is 72dpi.

Dynamic data | Data that is constantly updated and evaluated to provide a dynamic, changing view of the customer

Dynamic keyword insertion | In paid search advertising, this allows keywords used in searches to be inserted automatically into advert copy.

E

eCommerce | The buying and selling of products and services, including funds and data, electronically.

Editor | A person who determines the ultimate content of copy, traditionally understood to be in the newspaper, magazine or publishing industry context.

Email service provider | A service that helps you design and send emails.

Embedding | Taking video from an online video provider and posting it elsewhere on the web.

Event | A step a visitor takes in the conversion process.

F

Facebook Business Manager | A service from Facebook that assists with managing access to multiple Pages and ad accounts. The service is ideal for businesses that need different permissions for different people in the organization.

Feature | A prominent aspect of a product that is beneficial to users.

Fidelity | An interface design. A low-fidelity prototype will be basic, incomplete and used to test broad concepts. A high fidelity prototype will be quite close to the final product, with detail and functionality and can be used to test functionality and usability.

Flash | A technology used to show video and animation on a website. It can be bandwidth heavy and unfriendly to search engine spiders.

Focus group | A form of qualitative research where people are asked questions in an interactive group setting. From a marketing perspective, it is an important tool for acquiring feedback on new products and various topics.

Forum | A website where users can engage in discussions by commenting on threads or previous posts made.

Funnel | In web analytics or conversion optimisation, an established set of steps a user should take in reaching a goal, such as making a purchase.

Future/leading indicators | Information that can help a brand to make decisions about the future.

G

GIF | Graphics Interchange format is a computer file in the form of a bitmap image that enables short lops of video to be transferred online easily in small file sizes.

Global citizen | A person who identifies as part of a world community and works toward building the values and practices of that community.

Goal | The defined action that visitors should perform on a website, or the purpose of the website.

Google AdWords | Google's PPC program, which allows advertisers to display their adverts on relevant search results and across Google's content network.

Google AdWords | Google's search advertising program, which allows advertisers to display their adverts on relevant search results and across Google's content network.

Graceful degradation | The use of both modern and antiquated web techniques and code to provide a safety net, or fallback, for users with older browsers and technologies.

H

Handle | A public username used to identify individual users online, usually on social media. For example, @RedAndYellowEd is the Twitter handle for Red & Yellow.

Hard bounce | The failed delivery of email communication due to an undeviating reason like a non-existent address.

Hashtags | A word preceded by a hash, such as #nofilter, used to help users find posts related to their interests.

Heading tags | Heading tags (H1, H2, H3, etc.) are standard elements used to define headings and subheadings on a web page. The number indicates the importance so H1 tags are viewed by spiders as being more important than H3 tags. Using target keyword s in your H tags is essential for effective SEO.

Heat map | A data visualisation tool that shows levels of activity on a web page in different colours.

Heatmap | A data visualisation tool that shows levels of activity on a web page in different colours.

Home page | The first page of any website. The home page gives users a glimpse into what your site is about very much like the index in a book, or contents page in a magazine.

HTML5 | HTML5 is the most current iteration of the HTML (HyperText Markup Language) standard. It is a broad range of technologies that allow for rich media content and interaction on websites that do not require additional third-party plugins. It allows rich multimedia content to be displayed and easily viewed by users, computers and devices.

Hyperlink | A reference to data that users can find by clicking on a link, which will take them to the document or page to which it refers.

HyperText Markup Language (HTML) | A language read by web browsers. Certain HTML 'tags' are used to structure the information and features within a web page. As an example, HTML emails usually contain graphics and can be interactive.

Hypothesis | A statement that is being tested.

Hypothesis | A supposition that is tested in relation to known facts; a proposition based on reason but not necessarily assumed to be true.

I

Impression | Each time an advert is shown.

Information architecture | The way data and content are organised, structured and labelled to support usability.

Information architecture | The way in which data and content are organised, structured and labelled to support usability.

Internal link | A hyperlink on a website that points from one page to another on the same website / domain.

Internet of things | The interconnection of everyday objects to the Internet via embedded computing devices, giving them the ability to send and receive data.

Internet Protocol (IP) address | The Internet Protocol (IP) address is an exclusive number which is used to represent every single computer in a network.

Internet service provider (ISP) | Internet service provider; this is the company that provides you with access to the Internet, for example, MWEB, Verizon or AT&T

J

JavaScript | A high-level, dynamic programming language commonly used to create interactive effects within web browsers.

JavaScript | A popular scripting language. Also used in web analytics for page tagging.

K

Key performance indicators | The metrics that are examined to determine the success of a campaign.

Key phrase | Two or more words that are combined to form a search query are often referred to as keywords. It is usually better to optimise for a phrase rather than for a single word.

Key phrase | Two or more words that are combined to form a search query, often referred to as keywords.

Keyword | A word found in a search query. For example, a search for 'blue widgets' includes the keywords 'blue' and 'widgets'.

Keyword frequency | The number of times a keyword or key phrase appears on a website.

Keyword rankings | Where the keywords or phrases targeted by SEO rank in the search engine results. If your targeted terms do not appear on the first three pages, start worrying.

Keyword stuffing | The process of intentionally putting too many keywords into the metadata of the website or using many irrelevant keywords. Search engines can penalise websites using this practice.

Keywords | Words identified as crucial search and advertising parameters. These words are used in copy or posts to optimise discovery and engagement.

KPI | Key performance indicator, important metrics that can be measured to indicate success.

L

Lagging indicators | Older data that gives information on how a brand performed in the past.

Landing page | The website page that a user is sent to after clicking on any link or CTA, for example, in an email or affiliated site, in a display ad, or a paid or organic search engine listing. The landing pages that have the most success are those that match up as closely as possible with the user's search query or intention.

Landing page | The first page a visitor sees on a site. Usually it is specific to a campaign being run.

Lapsed | Someone who is no longer a customer

Lead | A person who has shown interest in a brand, product or service and could be converted into a customer.

Link | A URL embedded on a web page. If you click on the link you will be taken to that page.

Link bait | A technique for creating content that is specifically designed to attract links from other web pages.

Listening lab | A testing environment where the researcher observes how a customer uses a website or product.

Log file | A text file created on the server each time a click takes place, capturing all activity on the website.

LTE | 'Long term evolution'. A fourth-generation mobile communications standard and a name given to technology used in pursuit of faster data communication.

M

m-commerce | Mobile commerce, the use of wireless devices to conduct commercial transaction online.

Market share | In strategic management and marketing, the percentage or proportion of the total available market or market segment that is being serviced by a company.

Mass customisation | Tailoring content for many individuals. Metadata information that can be entered about a web page and the elements on it in order to provide context and relevant information to search engines.

Meta data | Information that can be entered about a web page and the elements on it to provide context and relevant information to search engines. Metadata includes meta and title tags.

Meta tags | Tags that tell search engine spiders exactly what a web page is about. It's important that your meta tags are optimised for the targeted keywords. Meta tags are made up of meta titles, descriptions and keywords.

Metadata | Information that can be entered about a web page and the elements on it to provide context and relevance information to search engines.

Metric | A quantifiable measure used to track the performance of a campaign. The most important metrics are called KPIs. Net promoter score (NPS) The KPI used to measure customer loyalty.

Metric | A defined unit of measurement.

Micro-conversion | A small conversion in the path to a full conversion, such as going from step one to step two in a checkout process of four steps.

Model | A strategic visual representation of a process that a company adheres to.

Multi-channel commerce | An online purchase experience that involves multiple channels, such as social media, company website, user reviews, in-store, traditional media and apps.

Multivariate test | Testing combinations of versions of the website to see which combination performs better

N

Native mobile application | A mobile application designed to run as a program on a specific device or mobile operating system.

Navigation | How a web user interacts with the user interface to navigate through a website, the elements that assist in maximising usability and visual signposting so users never feel lost.

NFC | 'Near-field communication'. A set of communication protocols that enable two devices, one of which is usually a mobile device, to communicate when they are within 4 cm of each other.

Null hypothesis | The default or general position, usually where no difference is the hypothesis

O

Objective | A desired outcome of a digital marketing campaign.

Observation/online ethnography | When a researcher immerses themselves in a particular environment in order to gather insights.

Omnichannel | Retailing strategy that delivers a seamless customer experience through all available shopping channels.

Online reputation management (ORM) | Understanding and influencing the perception of an entity online.

Open rate | The percentage of emails determined as opened out of the total number of emails sent.

Open source | Unlike proprietary software, open source software makes the source code available so that other developers can improve on or build applications for the software.

Opt-in | Giving permission for emails to be sent to you.

Opt-out | Also known as unsubscribe. The act of removing oneself from a list or lists so that specified information is no longer received via email.

Organic results | Also known as natural results. Search results served by the search engine's algorithm. The search engine does not charge website owners to list these results.

P

Page tag | A piece of JavaScript code embedded on a web page and executed by the browser.

Paid media | Any marketing efforts that involve a paid placement. PPC ads, branded content, display ads and promoted and boosted posts are all considered paid media. Paid media involves paying a third party to broadcast your message to others.

Paid search advertising | Usually refers to advertising on search engines, sometimes called pay-per-click or PPC advertising. The advertiser pays only for each click on the ad.

Pay per click (PPC) | Pay per click is advertising where the advertiser pays only for each click on their advert, not for the opportunity for it to be seen or displayed.

Payment gateway | eCommerce service that processes online payment for purchases through online stores.

Payment models | The various ways available to pay for ads online, such as cost per click (CPC), cost per engagement (CPE), and cost per mille meaning cost per thousand views, (CPM).

Persona | A character created to define a group of readers in order to speak to them as though they were a unique reader, creating the feeling of a one-on-one conversation.

Platform | A single social media network, such as Facebook, Instagram, or WeChat

Plug-in | Often referred to as a module or extension, a piece of third-party code that extends the functionality of a website.

Power Editor | Another Facebook advertising tool. It is designed for larger advertisers that may have a large number of ads running simultaneously. The tool provides precise control over all the campaigns.

Primary research | The collection of data to present a new set of findings from original research.

Product | An item sold by a brand.

Progressive enhancement | The development of web technologies in a layered fashion, prioritising basic content and functionality for all web browsers, while allowing users with higher bandwidth or browsers access to an enhanced version of the page.

Promoted content | Content (posts) that extends its reach via paid-for advertising/ promotion.

Proprietary software | Any software that one or more intellectual property holders own and licence to others in exchange for compensation, subject to certain restrictions. Licensees may not be able to change, share, sell or reverse engineer the software.

Prospect | A potential customer

Prototype | Interactive wireframes, usually of a higher fidelity, that have been linked together like a website, so that they can be navigated through by clicking and scrolling.

Push messaging | A notification from an app that displays on a smartphone while the app is not actively in use. This is triggered by an external event within the context of a connected device.

Q

QR code | Quick response code. A machine-readable code, like a barcode, that can be used to store information like URLs and can be read by an app through the camera of a smartphone.

Qualitative data | Data that can be observed but not measured. Deals with descriptions.

Quality score (QS) | A measure used by Google AdWords to indicate how relevant a keyword is to an ad text and to a user's search query.

Quantitative data | Data that can be measured or defined. Deals with numbers.

R

Ratio | An interpretation of data captured, usually one metric divided by another.

Referrer | When a user clicks on a link from one site to another, the site the user has left is the referrer. Most browsers log the referrer's URL in referrer strings. This information is vital in determining which queries are being used to find specific sites.

Research community | A community set up with the intention of being a source for research.

Research methodology | Methods employed in research for reaching results

Responsive design | A design approach that enables a website display to change depending on the size of the viewport or screen, regardless of the device on which it is displayed.

Responsive web design | Websites that fluidly respond to a user's device or screen resolution based on media queries sent between the site and the device regarding the specs of the device.

Return on investment (ROI) | The ratio of cost to profit.

Robots.txt | A file written and stored in the root directory of a website that restricts the search engine spiders from indexing certain pages of the website.

S

Sample size | The number of respondents in a sample of the population.

Search engine optimisation (SEO) | SEO is the practice that aims to improve a website's ranking for specific keywords in the search engines.

Search engine results page | The actual results returned to the user based on the search query. Sponsored results are search engine results that are paid for by the advertiser.

Search engine spiders | Programs that travel the web, following links and building up the indexes of search engines.

Search term | The keywords a user enters when searching on a search engine.

Secondary research | The collection of existing research data.

Segmentation | The practice of dividing customers into smaller sub-groups based on shared interests or characteristics.

Sender alias | The name that is chosen to appear in the sender or 'from' field of an email.

Sender ID | A method used by major ISPs to confirm that an email does originate from the domain that it claims to have been sent from.

Sentiment | The emotion attached to a particular mention which is positive, negative or neutral.

Server-side | Scripts that run on a server, as opposed to a user's browser

Short Message Service (SMS) | Electronic messages sent on a cellular network.

Single view of customer | Single view of customer is achieved when all customer information is available in a single central location.

Sitemap | On a website, a page that links to every other page in the website and displays these links organised according to the information hierarchy. While this is often physically available on a website (HTML sitemap), it should also be created as an XML file and included within the Robots.txt.

SMART objectives | A marketing objective that is specific, measurable, attainable, relevant, and time bound.

SMS | Short message service, a text message of up to 160 characters that can be sent from one mobile phone to another. MMS, Multimedia Messaging Service, is similar, but can include multimedia content and longer messages. This works on a regular cell phone connection, so it does not require a data connection or smartphone.

Social commerce | Subset of eCommerce that involves social media and online media that supports social interaction, where user contributions assist in online trade of products.

Social media dashboard | A service that allows you to centralise management of your social media properties.

Social media ROI | The return on investment on social media, difficult to measure straightforwardly, but important to track.

Social network | In the online sense, a type of website model where individual members become part of a broader virtual community, where they can share, communicate and collaborate in online commentary and engagement around a shared interest or goal.

Soft bounce | The failed delivery of an email due to a deviating reason like an overloaded email inbox or a server failure.

Spam | Email sent to someone who has not requested or given authorisation to receive it – EVIL!

Split test | Also known as an A/B test.

Stakeholder | A person or organisation with an interest in how a resource is managed.

Statistically significant | A sample that is big enough to represent valid conclusions.

Story | A narrative that incorporates the feelings and facts created by your brand, intended to inspire an emotional reaction.

Strategy | A set of ideas that outline how a product line or brand will achieve its objectives. This guides decisions on how to create, distribute, promote and price the product or service.

T

Tactic | A specific action or method that contributes to achieving a goal.

Tagging | Using a keyword or phrase to group pieces of content together under a specific theme, or assigning a piece of content to another user.

Target | The specific value that a marketer wants a metric to achieve.

Targeting options | The options available for ensuring that ads reach the right users at the right time.

Thumbnail | The small, still image that is shown at the start of the video. This can be selected, and can make a video more enticing.

Tone of voice | The register, formality and personality that comes through in the text.

Tracking | Measuring the effectiveness of a campaign by collecting and evaluating statistics.

Tracking code | A piece of code that tracks a user's interaction and movement through a website.

Traditional media | Media that is not digitally based or bought through digital metrics, these include TV, print, radio, magazine, activation and out f home (billboards). Digital billboards and activations using digital hologram technology, along with radio ads that integrate mobile technology, are blurring the lines between media.

Trend | To trend on social media means your content experiences a spike in popularity on a social media channel.

Tribe | A social group linked by a shared belief or interest.

U

Unique forwarders | This refers to the number of individuals who forwarded a specific email on.

Unique selling point (USP) | The aspect that makes your offering different from your competitors'.

Universal Resource Locator (URL) | A web address that is unique to every page on the Internet.

URL Shortener | A web tool that creates a shorter version of a full URL.

Usability | A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.

User experience design (UXD) | The process of applying proven principles, techniques and features to create and optimise how a system behaves, mapping out all the touchpoints a user experiences to create consistency in the interaction with the brand.

User interface (UI) | The user-facing part of the tool or platform i.e. the actual website, application, hardware or tool with which the user interacts.

User-centred design (UCD) | The design philosophy where designers identify how a product is likely to be used, taking user behaviour into consideration and prioritising user wants and needs. UCD places the user at the centre of the entire experience.

V

Video cards | Calls to action that pop up during a video and entice certain actions from viewers. Replaced annotations in 2017.

Viral | When a piece of content is shared in very large numbers it is considered to be viral. There is no exact number of shares that constitute viral. If the number of shares of a piece of content is exponentially larger than the usual number of shares of posts from that specific user, it can be considered to have gone viral.

Virtual reality (VR) | Computer-generated simulations of a 3D image or environment. Using the right equipment, a person can interact with that environment in a seemingly real way

Visitor | An individual visiting a website that is not a search engine spider or a script.

Vlogger | Video blogger. A person who produces regular web videos about a chosen topic on a video-enabled blog.

W

W3C standards | A common approach to development that focuses on accessibility and standardisation, overseen by the World Wide Web Consortium (W3C)

Web analytics | A software tool that collects data on website users, based on metrics to measure its performance.

Web application framework | Software used to help create dynamic web properties more quickly. This is done through access to libraries of code for a specific language or languages and other automated or simplified processes that do not then need to be coded from scratch.

Web browser | This is what allows you to browse the World Wide Web. Examples of browsers include Microsoft Edge, Chrome, OperaMini, and Firefox.

Web server | A computer or program that delivers web content to be viewed on the Internet.

White list | A list of accepted email addresses that an ISP, a subscriber or other email service provider allows to deliver messages regardless of spam filter settings.

Wi-Fi | The transfer of information from one device to another over a distance without using wires.

Wireframe | The skeletal outline of the layout of a web page. This can be rough and general, or very detailed.

X

XML sitemap | A guide that search engines use to help them index a website, which indicates how many pages there are, how often they are updated and how important they are.

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