

How To Measure Social Programs

Performance Management: The Social Marketing Playbook

by Melissa Parrish, Samantha Ngo, and Jessica Liu
January 9, 2017

Why Read This Brief

Social measurement is the bane of many marketers' existence. Marketers feel stuck with engagement metrics that don't tell them anything about the business impact of their social programs. This performance management report of the social marketing playbook shows marketers the three levels of measurement they need to focus on and introduces new methods, data, and vendors that can help.

Key Takeaways

Quantify Social's Overall Business Impact

Though still nascent, social attribution is finally emerging as a way for marketers to quantify the value of social programs. Brand health measurement is also a key element of social contribution.

Measure The Performance Of Individual Programs Against Life Cycle Progress

Measure the performance of each social program based on its ability to drive activity within a stage of the customer life cycle and how well it guides customers to the next phase.

Improve Your Social Content With Engagement Metrics

Shares, comments, and likes are not indicators of intent and they certainly don't show business value. However, social practitioners can track these signals to better understand which topics resonated best with their social audience.

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Social Measurement Is Complex And Confusing

Forty-four percent of marketers say they haven't been able to show the impact of social at all and another 36% say they have a good sense of the qualitative, but not quantitative, impact of social initiatives.¹ If brands are ever going to recognize that social networks, technologies, and data play an instrumental role in their post-digital transformation, this gap has to change.² But in order to move forward, we need to understand why this measurement gap exists in the first place. Social measurement is cumbersome and controversial because:

- › **Marketers mistakenly expect social metrics to parallel digital performance channels.** Marketers have come to expect that anything that happens online is directly, quantitatively measurable as consumers discover, click, and buy. But the beauty and the pain of social programs are that they encourage consumer behaviors that you can seed but can't control, which creates a universe of activity that extends beyond the brand's owned ecosystem and therefore is not measurable the way other digital channels are.³ As Rob Begg, vice president of social products at Salesforce explains: "Digital channels like SEM (search engine marketing) trained people to think \$1 in = \$1.25 out, but social is much more than that. We just can't prove it quantitatively."
- › **Social networks supply limited and varying performance data.** Social network performance data focuses only on leading indicators like clicks and possible reach, doesn't exactly match from one social network to the next, and isn't as robust as what you'll get from your other digital advertising partners. The social networks acknowledge these deficiencies, but lag in addressing it: Facebook is partnering with vendors on measurement products that attempt to link ad exposure to purchase intent, and Snapchat's recent move to ensure that all advertising is bought directly through it should mean more complete and standard performance metrics sometime in the future.⁴
- › **Most networks don't supply user-level data, isolating social performance.** Marketing must become customer-centric, serving individual customers' moment-to-moment needs, but that's not possible if marketers can't figure out who's already been exposed to what.⁵ For the social networks, user privacy must always be the top priority; but marketers don't need sensitive

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information to create intelligently-sequenced omnichannel media plans or personalized services. A balance must be struck: Every person we interviewed for this research told us that the most important thing they need to show social's value is anonymized user data so they can more accurately account for social touchpoints along the customer journey.

“As a platform you have the friction between consumers' trust and marketers' needs. Trust is earned in drops and lost in buckets.” (Arnie Gullov-Singh, global head of monetization at Tumblr)

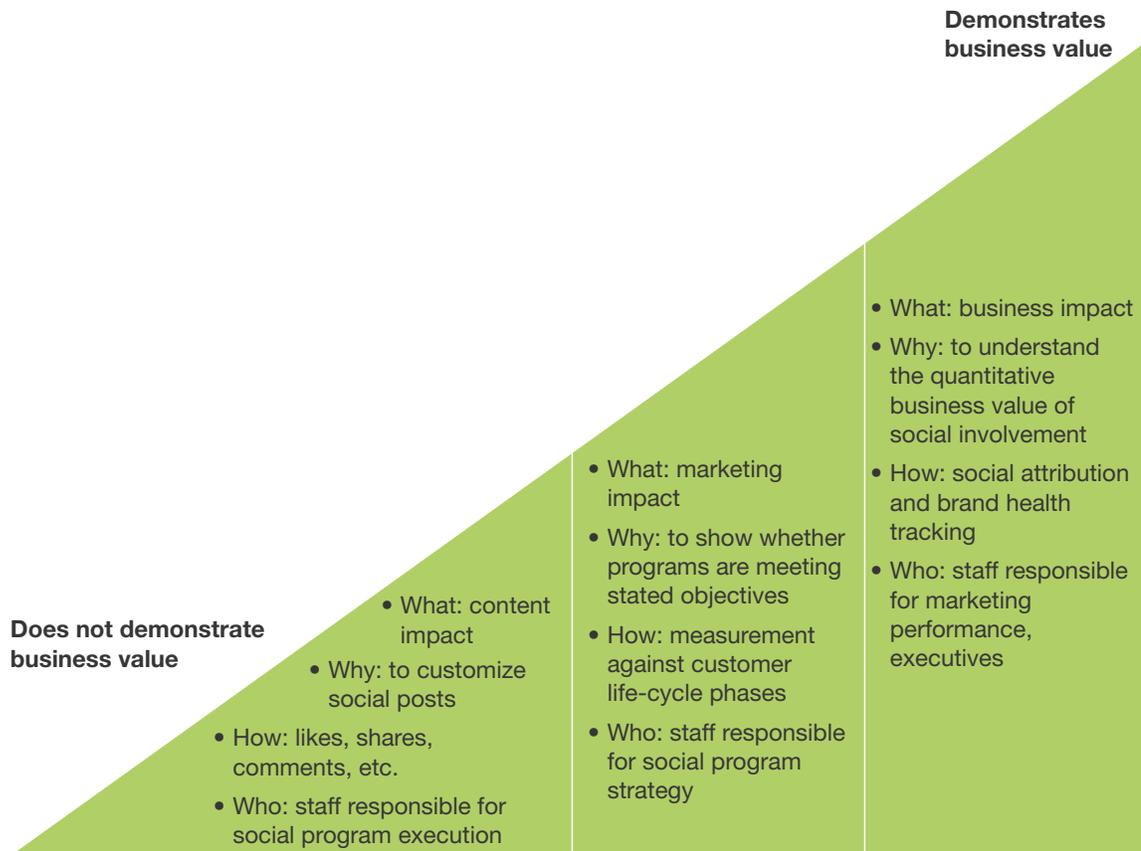
Build Three Types Of Social Measurement

Social measurement has come a long way in the decade since marketers first launched their Facebook pages, but its journey isn't done. Today, the least powerful social marketing measures — likes, shares, and other vanity metrics — are still the most prevalent. While sophisticated marketing measurement standards like multitouch attribution and our own unified marketing impact analytics (UMIA) have emerged, social has failed to keep up and so has limited impact in these models.⁶ But that doesn't mean social is unmeasurable. To get a decent — if still incomplete — picture of your social programs' performance, measure (see Figure 1):

1. **Business impact: Show social programs' deepest value.** The hardest type of social measurement is also the most important. With this step, you'll use the still-nascent tools available to show social's contribution to revenue and brand health. This is the quantitative view of your social efforts that matter most to executives.
2. **Marketing impact: Measure how well social programs serve strategic marketing goals.** In this step, you'll quantify whether social is helping you meet your objectives across the customer life cycle. Proving performance at this level is crucial for marketers responsible for setting strategic priorities and channel allocation.
3. **Content impact: Track topic resonance to improve your social content execution.** Don't worry, social media managers: you can still keep your eye on likes, comments, and shares. This most rudimentary form of social measurement doesn't tell you anything about social's effect on business outcomes, and your CMO shouldn't care about it at all; but it does help the staffers on the frontlines understand which content is capturing the attention of your social audience.

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FIGURE 1 Measure Your Social Performance For Content Impact, Marketing Impact, And Business Impact**Business Impact: Determine The Effect Social Has On Commercial Outcomes**

The holy grail of social measurement — value-based metrics for social marketing programs — are still not easy to come by. However, you do have some options for articulating the business value of social when your executives come calling. Marketers must:

- › **Measure attribution to assign a proportion of revenue to social programs.** Until Facebook and other social networks release anonymous user-level data, social attribution will be limited to measurement vendors' workarounds. Comprehensive? No. Worth a try anyway? Yes. Marketers who use Oracle and Adobe can take advantage of tags and metadata to track clicks to the brand's website — and that data can be exported for incorporation into attribution models.⁷ Social measurement vendor Simply Measured recently released a tool that allows similar dynamic link tracking, but also accounts for the performance of customer-sharing behavior of the brand's web content, making it the only vendor that has offered a solution for so-called "dark social" measurement.

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- › **Measure social's impact on brand health.** Social programs have two roles to play in brand health: First, one of the primary values of social listening is its ability to track brand health overall. Every social listening vendor cites this as a key use case for its platform and a key way to measure the value of procuring its services.⁸ Second, social media participation frequently affects brand health goals like awareness and purchase intent. For example, Perrier measured a four-point increase in purchase intent after an Instagram campaign, and Lego achieved an eight-point uplift in recognition of brand attributes among people who viewed inspirational videos on Facebook.⁹
- › **Look beyond social tools for business impact measures.** Don't rely on just your social listening platform's offerings. Your attribution and measurement partners may have workarounds for social attribution. And though digital marketers don't often use surveys to measure the impact of their programs, their traditional counterparts undoubtedly have expertise in this area. Also, whenever possible, add social profiles to your CRM system so you can track social's impact on loyalty and customer lifetime value.¹⁰ Dr. Pepper focused on measuring loyalty and discovered that even top customers increased their spending on the brand after connecting with its Facebook page.

Marketing Impact: Quantify Social Programs' Performance Against Marketing Objectives

Social programs must always be focused on making progress on one or more stages of the customer life cycle within a holistic marketing strategy (see Figure 2). To determine if your social efforts are helping you succeed:

- › **Measure how well you're achieving your stated objective.** The starting point for measuring any program should be whether you've moved the needle on the life cycle phase you've targeted. For example, anti-tobacco organization truth targeted the discover phase of the life cycle with a cross-platform social program targeting those who believed that smoking occasionally isn't a big deal. The "Big Tobacco Be Like" campaign resulted in a 55% increase in young people who understood that even if they only smoke once in a while, big tobacco profits at their health's expense.¹¹
- › **Measure how well you're guiding customers to the next phase of the life cycle.** All phases of the customer journey work together. To get a fuller picture of your program's performance, measure its ability to drive customers to the next phase of the life cycle. For example, PGA Tour Superstore created an explore phase program that aggregated golfers' top-voted items into a social gift guide. The retailer measured how much time people spent exploring the gift guide, but the tool's real success was driving customers to the buy phase: gift guide visitors converted 40% more often than shoppers who didn't visit the gift guide.¹²
- › **Define your social measurement plan before you launch.** In 2016, the No. 1 question marketers asked us about social marketing was how to back into meaningful metrics for programs they've been running, but not measuring, for years.¹³ Our answer? Don't. Whether you're launching an always-on social network presence or a bespoke campaign, always follow POST to ensure you have a clearly stated primary objective and a plan for what to measure and how to measure it before you launch.¹⁴

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FIGURE 2 Align Social Tools And Technology To The Customer Life Cycle For Best Results**Content Impact: Track Social Content Resonance To Inform Future Content Investment**

Let's not mince words: Measuring how well your content resonates with your social audience doesn't show the business value of social, and marketing leaders shouldn't make marketing decisions based on them. However, behavioral engagement measures do have a place in social measurement for those staffers responsible for execution: namely, showing social marketing practitioners the topics your audience finds the most interesting to guide you toward content that will resonate in social and beyond. For example, ZZZQuil got the idea for its "Sleep Like" TV campaign from a series of popular social posts on the same theme.¹⁵ To figure out what content your social audience wants from you:

- › **Track likes, shares, and other vanity metrics for content relevance only.** Though these measures are the least important for your company and tell you nothing about marketing performance, they're the easiest to get. Social marketing practitioners can view these metrics on social networks' native dashboards, in your social media management platform, from your social measurement vendor, and even from social listening platforms. Some vendors, like Synthesio, go a little further by identifying and separating out any interactions from paid influencers, to ensure that their clients can tell how much engagement has really been "earned."
- › **Don't benchmark against your competitors.** Comparing a brand's social content engagement rates to that of competitors is gaining in popularity. Don't be distracted by this exercise. Customers don't compare brands to decide who to follow, so leapfrogging a competitor in social audience size is pointless. Your benchmarking will be inherently flawed since you can't tell whether your competitor is spending tons of money to promote its content or if its engagement levels are driving business goals. Though most vendors offer this "keep-up-with-the Jones" service, the majority doesn't rely on this one product: Socialbakers, a popular competitive benchmarking vendor, has a product that explores industry-level social engagement data, which we find to be a far more meaningful offering.

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Recommendations

Don't Expect Vendors And Platforms To Solve All Your Problems

We spoke with many vendors for this research and unsurprisingly, they're all ready to help you through all three levels of social measurement. But it would be a mistake to expect them to do all of the heavy lifting. Remember, UMIA is the future of marketing analytics, and if you don't grab the reins of social measurement now, you'll be left at the mercy of your analytics vendors' social capabilities when you implement your UMIA plans.¹⁶ Before you approach a vendor or social network for help articulating the value of social, clearly define your needs and plans for how it will help you. To ensure a successful measurement plan:

- › **Know the monetary value of the actions you want to drive.** Social attribution means assigning a proportion of revenue to social programs, but to do it right, you need to know the monetary relationship among all channels, not just social ones. For example, if you're hoping to drive email sign-ups with your social program, you need to know the value of an email sign-up to your business before you can assign some portion of that value to social. This is not a trivial exercise, so if your company hasn't yet embarked on attribution modeling, you'll need to work with your customer insights colleagues to craft a plan to measure all of your marketing programs before you can quantify social's contribution.¹⁷
- › **Determine exactly what data you need — and then tell the social networks directly.** Complaining that social networks don't give you enough data isn't helping anyone. Either individually or as part of a consortium of marketers, articulate exactly which data points about performance or users will help you measure your goals and then approach the social networks with your analysis. Though they're not known to just give marketers what they ask for, it's in their best interest to listen to you if you can make it clear how you're accounting for user privacy and how the data will help you succeed. As Maggie Merklin, executive vice president at Analytic Partners says, "Until they find the balance between user privacy and marketers' data needs, the social networks are getting only a fraction of the credit they deserve for impacting the customer journey."
- › **Leverage younger platforms' hunger to experiment with new measures.** Newer social networks that don't yet have unicorn-level valuations need your help to craft their monetizable products. That means you'll have more influence over the data you receive from them to measure your programs. Take advantage of this position by approaching the emerging social players with your requests and ideas for new ways to measure your initiatives. For example, luxury group LVMH is testing programs on Snapchat and working with a startup to experiment with different KPIs and measurement goals.

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Supplemental Material

Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

Adobe

Simply Measured

Analytic Partners

Socialbakers

Crimson Hexagon

Spredfast

LVMH

Synthesio

Oracle

Tumblr

Orange

Wpromote

Salesforce

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Endnotes

- ¹ Source: “CMO Survey Report: Highlights and Insights,” The CMO Survey, August 2016 (https://cmosurvey.org/wp-content/uploads/sites/11/2016/08/The_CMO_Survey-Highlights_and_Insights-Aug-2016.pdf).
- ² Nearly all marketers use social media, but few are able to quantify its value. In this report, we show how brands use social tactics to achieve marketing goals across the customer life cycle and how they use social insights to improve the rest of their marketing campaigns. See the Forrester report “[You Don’t Need A ‘Social Marketing’ Strategy.](#)”
- ³ B2C marketers have a glut of metrics to help them determine marketing effectiveness. But more metrics don’t necessarily mean better insights. Marketers must let go of vanity-based metrics — such as shares, likes, click-through rates, and impressions — and embrace metrics that clearly link marketing success to business value. See the Forrester report “[Marketers: Stop Using Vanity Metrics To Value Your Marketing.](#)”
- ⁴ Source: Peter Kafka, “Snapchat wants to stop sharing ad revenue with its media partners,” Recode, October 18, 2016 (<http://www.recode.net/2016/10/18/13326196/snapchat-discover-ad-sales-plan-change>).
- ⁵ We’ve entered a new world order where entitled customers integrate digital fluidly into physical experiences and marketing practices haven’t kept up. The fix is a new marketing worldview. See the Forrester report “[Thriving In A Post-Digital World.](#)”
- ⁶ Today’s consumers traverse myriad interactions before they buy, and this increasingly complex media environment has made once-reliable marketing performance measurement techniques obsolete. As a result, marketers often don’t know how to credit marketing tactics with a customer action. They’ve relied on marketing mix and attribution models, but both approaches fall short. Marketers must embrace a new measurement standard — unified marketing impact analytics (UMIA) — that will measure marketing’s entire value and identify the best ways to optimize customer interactions. See the Forrester report “[Embrace Unified Marketing Impact Analytics To Deliver Value Across Interactions.](#)”
- ⁷ Aside from feeding data into attribution models, these tools can also be used for limited cross-channel campaign measurement.
- ⁸ To find out more about the most significant enterprise social listening platform providers and how they measure up, see the Forrester report “[The Forrester Wave™: Enterprise Social Listening Platforms, Q1 2016.](#)”
- ⁹ Sources: “Bubbling Sales with Colorful Ads,” Facebook (https://scontent.fewr1-1.fna.fbcdn.net/t39.2365-6/14827241_1176479305768206_7929744861010329600_n.pdf) and “Lego Kronkiwongi,” Shorty Awards (<http://shortyawards.com/8th/lego-kronkiwongi>).
- ¹⁰ Tracking social engagement data doesn’t make measuring social marketing easier. Marketing leaders must gauge the performance of their Facebook pages and Twitter accounts by tracking customer loyalty and lifetime value. For ways to break away from meaningless engagement metrics, and find out which tools can help marketers measure the business outcomes of their social programs, see the Forrester report “[Brief: Stop Measuring Social Engagement.](#)”
- ¹¹ Source: “#BIGTOBACCOBELIKE,” Shorty Awards (<http://shortyawards.com/8th/bigtobaccobelike>).
- ¹² In Q1 2015, we asked more than 100 reference clients of social relationship platforms (SRPs) to rate the SRPs’ measurement capabilities; those clients gave the vendors an average score of just 3.8 out of 5. (No other part of the SRPs’ functionality scored below 4.3 out of 5.) Reference clients of social depth platforms (SDPs) gave the SDPs even worse scores for measurement: just 3.5 out of 5 (no other part of the SDPs’ functionality scored below 4.0 out of 5). Source: Forrester’s Q1 2015 Global Social Relationship Platform Wave™ Online Survey and Forrester’s Q1 2015 Global Social Depth Platform Wave™ Online Survey.
- ¹³ Source: Analysis of Forrester’s social marketing inquiries for 2016.
- ¹⁴ This report provides B2C marketers with a process to successfully integrate social into their marketing strategy by methodically assessing audience, objectives, and tactics. See the Forrester report “[Drive Social Marketing Success With The POST Process.](#)”

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¹⁵ Source: “Sleep Like,” Publicis (<http://www.publicisna.com/project/zzzquil/>).

¹⁶ Today’s consumers traverse myriad interactions before they buy, and this increasingly complex media environment has made once reliable marketing performance measurement techniques obsolete. As a result, marketers often don’t know how to credit marketing tactics with a customer action. They’ve relied on marketing mix and attribution models, but both approaches fall short. Marketers must embrace a new measurement standard — unified marketing impact analytics (UMIA) — that will measure marketing’s entire value and identify the best ways to optimize customer interactions. See the Forrester report “[Embrace Unified Marketing Impact Analytics To Deliver Value Across Interactions.](#)”

¹⁷ In order to navigate the complexity of today’s digital media environment, marketers must embrace multitouch attribution (MTA). MTA data not only helps marketers better understand the value of their audiences and channels, but can also drive smarter auto-optimization with demand-side platforms (DSPs) and bid management platforms. See the Forrester report “[Brief: Drive Programmatic Action With Multitouch Attribution Data.](#)”

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