Second edition

Social Media Marketing
India Trends Study

Insights from social media-savvy brands in India
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Dear Readers,

Welcome to the second edition of our EY Social Media Marketing India Trends Study. We hope your year has been well and exciting in your digital and social media initiatives. In 2013 we explored how social media-savvy brands in India are using the medium, their objectives, budgets, measurement and ad spends to build communities, generate participation and sustain engagement. We found some interesting insights from our study, from digital marketers, brands managers and bloggers across India.

In 2014, we actually wanted to go ahead in exploring and understanding the maturity of the Indian digital scene, with respect to ad spends, investments, social listening, measurement tactics, internal dynamics and the relationship model with external agencies.

With so much to explore, we reached out to India’s top Digital and Social Media–savvy brands from the third quarter of 2014 till January 2015. We received a total of 21 participations from professionals who are responsible for managing the digital outreaches of their respective organisations or brands.

To sum it up, this exercise is conducted to understand the levels of social media capability maturity, especially with regards to processes and policies, technology and governance across organisations in India. It represents the point of view of brands that have initiated their digital journey and have invested in terms of money, people and processes. We think this will help us create a benchmark across the industry and help everyone to understand how digital is shaping our lives as marketers and as consumers alike.

We have added our perspectives and secondary research to augment the findings and provide depth and context to this study. With this, we would like to thank all our participants, brand managers, bloggers, influencers and industry experts who have shared their PoV.

Dinesh Mishra
Customer Practice Leader (India)
EY
Participating organisations/brands

<table>
<thead>
<tr>
<th>Jet Privilege Pvt. Ltd.</th>
<th>Hasbro Clothing Private Ltd.</th>
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<tbody>
<tr>
<td>Lavasa Corporation Ltd.</td>
<td>Idea Cellular Ltd.</td>
</tr>
<tr>
<td>Tata Global Beverages</td>
<td>Mahindra Holidays</td>
</tr>
<tr>
<td>Tupperware India</td>
<td>Marico</td>
</tr>
<tr>
<td>HDFC Bank</td>
<td>Cyber Security Integrators India Pvt. Ltd.</td>
</tr>
<tr>
<td>Bajaj Finserv Lending</td>
<td>VECH</td>
</tr>
</tbody>
</table>

*Only brands that agreed to be listed in this report have been mentioned here.*

As part of the study, we asked our participants a set of 37 questions regarding the use of social media in their organisations. Input was collected online, on email, or through telephonic interviews. Responses to each question have been quantified and represented in charts in this report.

We also reached out to various brand managers, industry experts and bloggers to provide their perspective on various topics around their specialty areas, which is also being covered in this study. Their inputs are meant to provide depth to the report, and not to be seen as endorsements to survey findings.
Key findings

Social Media Marketing - India Trends Study provides answers to some pertinent questions around social media marketing among organisations in India:

Section 1:

What has changed since 2013?

a. Objectives
   i. The top three objectives to be present on social media for the brands we surveyed were Building Brand Awareness/Highlight Brand News, Building a Community and Customer Engagement.
   ii. Reputation Management, Thought leadership and Recruitment also showed up as new objectives in 2014 (they did not come up as focus areas in 2013).

b. Platforms
   i. Facebook is still the dominant platform, followed by Twitter and YouTube.
   ii. Google+ and LinkedIn (40% and 30% of survey respondents, respectively) are new platforms, which were introduced by brands in 2014 to engage with professionals. 25% of brands also introduced Twitter, Instagram and Pinterest.

c. Frequency of updates and average response time
   i. 86% of clients surveyed engage on multiple platforms at least once a day and 53% engage twice or more.
   ii. Brands stated that average response times is one to five hours, which means brands are being careful about crafting responses and responding back to fans and followers.

d. Budgets
   i. 90% of companies surveyed, spend up to 15% of their annual marketing budget exclusively on social media (up from 78% in 2013).
   ii. 23% of surveyed brands stated their social media budgets were INR1 million (INR10 lakhs) or less, while 14% stated they spent INR10-20 million (INR1-2 crore), both up from 2014 (from 11% in 2013 to 14% of respondents in 2014).

e. Challenges
   i. Brands are becoming clearer on the challenges they faced in 2014 as compared to 2013.
   ii. Top three challenges stated were not being able to successfully measure effectiveness of social media engagements, sustaining or increasing engagement rates and creating/curating content.

f. New activities invested in and quick highlights. What kept you busy most of the year?
   i. 58% of survey respondents launched their brands on a new platform, leading to driving engagement by launching integrated 360° campaigns and defining new success metrics. One third of the brands surveyed set up a new in-house social media team.
   ii. Several brands stated their highlights included pushing out 360° campaigns, while others were seeing dividends such as increased engagement rates and better targeting due to their social media strategies.

Section 2:

How do companies evaluate, strategise, deploy and invest in social media?

a. How Indian brands think digital and function
   i. 83% of surveyed brands stated that they had a social media strategy in place that is aligned to the business vision, while around 11% of the brands did have a social media strategy but was not linked to any performance indicators.

b. Planning and internal resources
   i. 27% of surveyed brands have an internal core team for strategy and implementation of social media initiatives, while 11% of brands in India outsource it completely to external partners.
   ii. Majority of brands (67%) have a hybrid model where the internal core team is supplemented by social media agencies and consultants.
   iii. 66% of teams consist of up to three dedicated resources that are entirely responsible for end-to-end social media initiative and operations.
   iv. Around 95% of survey respondents stated that Marketing, Communications and PR departments handle social media at their organisations, followed by reduced involvement from Legal (26%), HR (21%) and IT (16%).

c. Implementation
   i. 79% of brands surveyed in India rely on an agency for their social media requirements during implementation and roll out of campaigns.
How to use this report
No matter at what maturity stage your brand is in its digital journey and regardless of your organisation’s experience with social media marketing, you will be able to relate to many findings in this study. You can use these outcomes to compare your brand against others on social media, in terms of objectives, spends, campaign mechanics, internal dynamics, future trends and see how you can leverage the medium most effectively before planning your next campaign or approving budgets.

Section 2: Cont’d...

How do social-savvy brands measure success?

a. Identifying key success metrics
   i. Engagement (94% of brands surveyed), Social Reach (89%) and Visitor Growth Rate are the key social media metrics tracked by social media savvy brands.

b. Taking success metrics back to business objectives
   i. Any measurement must tie back to the goals of the organisation and is only effective if the brand knows what to measure and why.
   ii. Conversions (78% of surveyed brands), Leads (44%), RoI (33%) and Sales (22%) emerge as critical business metrics to measure success of social media efforts.

c. Who measures them?
   i. Majority of businesses surveyed (56%) have an in-house team that handles social media metrics

marketing campaign, while 32% use only two platforms.

d. Campaign deployment
   i. More than half of surveyed brands preferred to create an integrated 360° campaign from the beginning, rather than adding on social media marketing activities to traditional marketing campaigns later.
   ii. Surveyed brands consider Market trends (74%) and Customer Insights (63%) as key factors that drive their social media campaigns in India. Looking at competition activity does not come across as an important consideration (only 16% brands surveyed consider this when planning social media campaigns).
   iii. 42% of the brands typically take up to three weeks to design and deploy a social media campaign, while 32% of survey participants take up to two weeks. At least one brand stated that they can deploy a campaign in less than a week.
   iv. 58% of Indian brands surveyed integrate up to five social platforms as a part of the larger integrated

How do social-savvy brands measure success?

i. 74% of respondents preferred using a pure play digital agency compared to PR, ad agencies, or freelancers.

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   iv. 58% of Indian brands surveyed integrate up to five social platforms as a part of the larger integrated

How do social-savvy brands measure success?

ii. These in-house teams typically have smaller teams of up to three full time employees specifically for social media analytics and measurements.

d. Brand monitoring
   i. 61% of organisations confirmed to using a social media listening tool to track their brand sentiment.
   ii. Radian6 and Meltwater emerge as widely used tools among the most popular brand monitoring and sentiment analysis tools available.
   iii. Better understanding of the perception of the brand (67% of brands surveyed), effective management of customer queries (58%), better customer insights (50%) are some of the major benefits that organisations have reaped by combining social listening with social media marketing.

Section 3:

f. Challenges and key focus areas
   i. Identifying and reaching out to the right target audience on social media remains the top challenge for Indian brands, followed by monetary constraints (budgetary approvals for social media initiatives) and as are calculating the RoI and defining success metrics for the amount spent.

Section 4:

The next big thing

i. Brands surveyed stated they are looking to introduce Social CRM and Social Commerce as priority items on their Social Media agenda, followed by Customised ads/campaigns and Gamification.

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Section 1

What has changed since 2013?

Existing platforms

What Social Media platforms are you currently present on?
Please rank in order of importance (1 being most important).

<table>
<thead>
<tr>
<th>Platform</th>
<th>Average Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>8.6</td>
</tr>
<tr>
<td>Twitter</td>
<td>7.1</td>
</tr>
<tr>
<td>YouTube</td>
<td>6.5</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>5.1</td>
</tr>
<tr>
<td>Google+</td>
<td>4.8</td>
</tr>
<tr>
<td>Instagram</td>
<td>4.3</td>
</tr>
<tr>
<td>Blog</td>
<td>4.0</td>
</tr>
<tr>
<td>Pinterest</td>
<td>3.1</td>
</tr>
<tr>
<td>Foursquare</td>
<td>1.7</td>
</tr>
</tbody>
</table>

Social media usage in India increased in leaps and bounds, as number of internet users in India reached 302 million users by December 2014. India is a key market for social media giants – active social media users in India grew to around 106 million and India is among the top three countries in terms of number of people using Facebook (100m+ users), whereas Twitter is seeing an increased user base of over 33 million. The increased mobile web penetration is also seen as a key contributor to increased growth in active social media usage – 84% Facebook’s 100 million users in India access it from their mobile devices.

81% of the brands surveyed considered Facebook to be the most important platform, while almost 48% of surveyed brands think that Twitter is the second-most important platform to be on, closely followed by YouTube (43% surveyed brands considered it to be the third-most important channel).

Businesses are also establishing their own YouTube channels while actively producing, curating and distributing video content for promotional material and showcasing new developments for the brand. Meanwhile, Vine, the latest entrant in social media platforms, concentrates on short six second video snippets that can be shared using Facebook or Twitter. Currently, it has not yet made a significant impact in India, but we will be keeping an eye out on this platform, especially to see how it will be used in marketing campaigns for the use of short teasers and promo videos that help showcase and build brands.

While Indian users and businesses get more comfortable using social media platforms to engage with each other, it is clear that Facebook is still the dominant platform, followed by Twitter and YouTube.
Renewed focus on YouTube/Online video as an alternative media channel was the highlight
- Response from survey respondent

New platforms introduced
Have you introduced any new platforms in the past one year?

Several brands introduced new platforms in 2014 – Google+ and LinkedIn being the most common (40% and 30% of survey respondents, respectively). While LinkedIn and Google+ focus more on professional networking and knowledge sharing, Instagram and Pinterest (new channels launched by 25% of respondents) have become key platforms for several retail and travel brands that are engaging with customers.

25% of brands surveyed also launched their Twitter feeds, while 20% of respondents reference blogs and slideshare as new platforms to showcase their thought leadership and stand-alone mobile apps for improved engagement. However, content published on knowledge sharing platforms such as blogs and slideshare also need to be published on other social channels, in order to reach audiences present on these other platforms. For instance posts published on EY’s Advisory India blog is promoted internally to employees on Yammer, a social networking tool for organisations, as well as externally on Twitter, LinkedIn groups as well as emailed directly to subscribers in order to ensure that all target users learn about new posts on channels that they frequent.

Facebook did not feature very prominently here, since it is the most common platform already in use, and most brands already have some sort of presence on it.
Foursquare does not seem to be a platform that people are investing in as a channel any more, despite 26.4% of companies surveyed in 2013 saying that they will use Foursquare in next year. Facebook Places, Facebook’s check in functionality seems to have taken over from Foursquare as being the preferred location-based tagging tool in 2014. Even Instagram, which earlier relied on Foursquare, switched over to Facebook Places in 2012, when it was acquired by Facebook. While Facebook does not have many of the loyalty-based badges and engagement functionality that Foursquare offers, it has the advantage of being India’s most popular social network and provides an easy way of engaging with consumers’ existing friends network. It also taps into the extensive brand presence, making it easier for businesses to implement geo-tagging features through Facebook rather than invest in maintaining a completely separate platform.

The top-3 objectives to be present on social media for the brands we surveyed were Building Brand Awareness/Highlight Brand News, Building a Community and Customer Engagement. However, Reputation Management, Thought Leadership and Recruitment also showed up as new objectives for brands in their social media strategy (they did not come up as focus areas in 2013).

Surprisingly, Customer Engagement was not a key focus area in 2013, as brands were more focused on building their communities. In 2014, keeping their communities of brand loyalists and advocates active and engaged has become an area of focus for brands. Additionally, for brands, engaging with customers on social media, and responding in near real-time, will help create a culture of innovation and transform customer communication and experience.
**Budgets**

Approx. what percentage of your overall marketing budget do you spend exclusively on Social Media?

90% of companies surveyed, spend up to 15% of their annual marketing budget exclusively on Social Media (up from 78% in 2013). 5% of brands surveyed are willing to spend up to 20% of their annual marketing budget on social media in 2014.

75% of India’s online population are digital consumers (who use digital for all, or part, of their purchasing journey). Trust in a company and brand is no longer dependant on company-controlled, traditional, mass channels, but rather on communities and peers through social media and other digital channels. This indicates, businesses will have to allocate significant percentages of their marketing budget to digital and social media marketing in order to successfully reach and market to these customers. While television counts for 44% of the overall marketing spend in India INR386 billion (INR38,598 crore) spent on advertising in 2013, the increasing internet penetration rate will increase digital advertisement spend in India. At the end of 2014, digital marketing spends are expected to reach INR27.5 billion (INR2,750 crore) (an increase of 30% from 2013) and Indian brands are expected to spend INR12.17 billion (INR1217 crore) on social media marketing in 2014, (up 74.3% from 2013).
There was an increase in brands that stated their social media budgets were INR1 million (INR10 lakhs) or less (from 20% in 2013 to 23% of respondents in 2014). These could be brands establishing their social media presence on a limited number of platforms. 14% of brands stated they spent INR10–20 million (INR1–2 crore) in 2014 (up from 11% in 2013).

There was a decline in number of participants stating they had a social media marketing budget in excess of INR20 million (INR2 crore), which could mean brands are learning to optimise their spends. As integrated campaigns become more popular, being able to correctly attribute leads, conversions and returns to channels, campaigns and devices will determine how budgets are allocated going forward.

Key challenges

What are the challenges that you faced in 2013 in marketing your brand on Social Media?
As social media marketing becomes a focus for brands, the marketers are now realising some key challenges. This edition of the report has an increased focus on these challenges, since more issues come to light for brands.

More than 70% of brands stated that being able to successfully measure effectiveness of their social media engagements is a challenge. As social media budgets increase, organisations will need more clarity on the effectiveness of their social media activities, and how to optimise their spends on social media (both platform and activity specific). Being effectively able to define measurable outcomes will become more important, which will require investments in measurement and analytics tools as well as training and skills development. This may also be a contributing factor toward why it did not reveal marked increases in social media marketing budgets among surveyed brands in previous question.

Sustaining and increasing engagement rates is also a key challenge, as stated by 62% of surveyed companies. As social media initiatives become more sophisticated, acquiring fans and likes will not be enough (only 19% of brands surveyed stated this as a challenge). The quality of engagement, including targeting the right segments and converting them into active users and loyal brand advocates will also become a hurdle. Additionally, creating and curating content that will sustain and increase engagement is a key challenge, as mentioned by 52% of our survey participants. Creating content for integrated campaigns across channels, the increased use of video and image content as well as ensuring content is device agnostic, are key aspects that will need to be addressed in order to ensure continuous engagement.

Lowlight: Decreasing organic reach with increasing difficulty in sustaining engagement rates

Survey Respondent

How Club Mahindra uses content, visuals and campaigns to engage with their target audience on various social media channels

1. Stay true to brand values
   Visual Grammar One of our “brand values” is “Making Smiles”

2. Keep in mind the target audience
   Our Facebook page is aimed at bringing a smile on our customer’s faces. In addition, the fact that the audience on Facebook is younger implies that we need to post content, which engages them and makes them share it. Playful, humorous, consistent, works effectively on social media and engages the brand community while taking about various experiences that Club Mahindra has to offer.

3. Engage with our community visually and through interactive content
   And a visual grammar that uses our logo and the heart mandalas, has fun using our Visual identity and cuts through the Visual clutter. The Visual Grammar cherry-picks interesting events and activities related to Club Mahindra Resorts such as pieces of resort culture, iconic events, latest trends and expresses them through the Club Mahindra Mandala. The content thus created is instantly interactive and shareable, creating a platform for conversations. We created a series of posts such as Fun @ resorts, Food @ resorts, guess the destination, etc. Throughout, we used elements of our Visual Identity (the heart Mandalas) to drive home our message.

4. Channels and frequency
   While Facebook has been the lead medium, we have extended this communication to Twitter, Instagram, Google +, Pinterest and WhatsApp. Each day three posts are published across all social media platforms.

5. Employee participation
   Another interesting aspect regarding execution of this campaign is that the posts are shared one day prior with Club Mahindra employees over WhatsApp. Multiple WhatsApp groups were created, which gathered voluntary participation from employees of Club Mahindra. This helped in getting feedback and also to get all employees excited. All the employees look forward to the posts and the healthy discussions in the groups. They started sharing the posts with their friends and families, thus creating a positive buzz around the brand. Employees even started sharing ideas on the group.

Deepali Naair
Chief Marketing Officer
Mahindra Holidays and Resorts India Ltd
Frequency of updates

What is the frequency of updates you make on your social networks?

One-third of the brands surveyed in 2014 post onto their platforms once a day, and another 43% post updates more often. Based on 2013’s survey, we only had data specific to Facebook and Twitter, since those were the most active engagement platforms.

In this edition, while our surveyed brands indicate being present on platforms other than Facebook and Twitter, we do not have data for individual engagement frequencies of every platform they are on. However, there is a decline in the frequency of multiple posts per day with respect to data from 2013 across all platforms. 86% of clients surveyed engage on multiple platforms at least once a day and 53% engage twice or more.

On the whole, as companies focus on integrated campaigns and consistency across platforms, they push coordinated content on all platforms required for their campaign simultaneously.

“The most damaging mistake, brands make on social media while engaging with their audience is, taking the network as broadcasting medium. Wrong! Social media is an interactive tool, which lets you connect with your audience to know them better, serves them better.

But the question is, how?

“Less is more” is the golden rule for social media. One post a day is good on Facebook. One tweet an hour is enough to share knowledge on Twitter. One contest a month is sufficient to win your audience’s hearts.

For any marketer, a customer equals to his/her love interest. They need to be charmed, pampered, and wooed. Moreover, modern day consumers are smart enough to understand who actually loves them and who just pretends.

So, inbound marketing is the way, it should be. Post to add value. Work on your content in a way that your audience cannot ignore it.

Don’t start conversations with an automated or promotional message. It’s a complete turn-off for any customer. Spend some time in sending personalized messages that would help them.

Your customers want to be heard. Try to solve an issue or query or confusion within 2 to 3 hours of the occurrence. If you are blameworthy, apologize and offer an incentive. The more you delay, the more their dissatisfaction level goes up.

Don’t delete a negative comment because an angry customer would find another hundred channels to vent out his/her anger. Remember, social media is a big bad world for those who do wrong.

Last but not the least, don’t do overly self-promotional. If they come to you, don’t try to push-sell. Help them educate about the product/service and let them decide."

- Ishita Ganguly, SocialMediaToday.com
Average Response Time

What is your average response time in which you attempt to reply to users on a social networking platform?

![Average Response Time Chart]

2013’s survey regarding average response time only captured data specific to Facebook and Twitter, since those were the most active engagement platforms.

Average response time of 30 min or less were recorded by 38% of brands in 2014 (compared to average response times stated by 25% brands for Facebook and 28% of brands in 2013).

Meanwhile 19% of brands in 2014 (as compared to response time stated by 12.5% brands for Facebook and 14% of brands in 2013) stated they took between 13-24 hours.

However, a majority of brands, both in 2013 and 2014, stated that the average response time is 1-5 hours.

As brands start using social media platforms for more than marketing (e.g., Customer Service and Crisis Management), the time taken to respond via social media channels will be seen as critical in the way a company handles customers. Meanwhile, from a marketing point of view, well stated responses that result in meaningful conversations on social media will prove to be more valuable than a quicker response time.
New activities

What new activities did you initiate or invest in the past year?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Considered new metrics measurements and analysis</td>
<td>57.1%</td>
</tr>
<tr>
<td>Launched a 360 Integrated Campaign</td>
<td>57.1%</td>
</tr>
<tr>
<td>Introduced the brand on a new SM platform</td>
<td>57.1%</td>
</tr>
<tr>
<td>Set up a new in-house team for Social Media</td>
<td>33.3%</td>
</tr>
<tr>
<td>Introduced a Social Media Monitoring tool</td>
<td>28.6%</td>
</tr>
<tr>
<td>Created internal social media policies and guidelines for employees</td>
<td>28.6%</td>
</tr>
<tr>
<td>Initiated Social CRM efforts</td>
<td>14.3%</td>
</tr>
<tr>
<td>Others</td>
<td>10.0%</td>
</tr>
</tbody>
</table>

57% of survey respondents launched their brands on a new platform, conducted integrated 360 campaigns and defined new success metrics. One third of the brands surveyed set up a new in-house social media team, while 29% of respondents created social media guidelines for employees and introduced social media monitoring tools for improved analysis and data.

As mentioned earlier, less than 5% of brands surveyed mentioned that establishing social guidelines and policies is a challenge. This is substantiated by Ernst & Young Social Media Governance Maturity Model, which states that defining and establishing a Social Media Strategy, Vision, Goals, and KPIs are of higher priority. As a brand matures, the need for Social Media Guidelines and Policies will become imperative.

Highlights and lowlights

Key highlights of your brand’s presence on social media

- “Newer & sharper targeting parameters”
- “360° campaigns”
- “Feel good about profile of self and trade body, but unsure of making any kind of capitalisation on this!”
- “Consistent lead gen activity and effective online reputation management”
- “360° campaigns”
- “Renewed focus on YouTube/online video as an alternative media channel was the highlight”
- “Built communities across platforms and effective customer service response mechanism”
- “Highest number of followers in BFSI sector on LI Crossed 1 million FB fans”
- “High engagement”
- “Engagement soared thanks to high quality content & contests.”
- “UGC”

(Responses from survey respondents)

Key “lowlights” of your brand’s presence on social media

- “Transparency and consistent flow of info across centres”
- “Death of organic reach on Facebook”
- “Sustaining Engagement on FB”
- “25+ age group acquisition”
- “The pace at which the community was growing has slowed down thanks to social media fragmentation.”
- “There are limitations for reaching out to business audiences”
- “Online Reputation Management”
- “The lowlights is that the brand that I work for is not so active on any professional or public forum.”

(Responses from survey respondents)
# EY Social Media Governance Maturity Model

<table>
<thead>
<tr>
<th>Analysis and monitoring</th>
</tr>
</thead>
</table>
| Are all social media sites relevant to all major aspects of my business monitored?  
| Is there a risk analysis regarding incidents on social media channels? Is there an incident response process focused not only on customer feedback and interaction, but also on IT-related security and privacy-related issues? |

<table>
<thead>
<tr>
<th>Assessment</th>
</tr>
</thead>
</table>
| Is the social media strategy inclusive, bringing in all impacted corporate departments and functions, such as marketing, legal, HR, IT, operations and logistics?  
| Are risks related to the use of social media platforms clearly identified? Does my view of the landscape include unique sector-specific perspectives? |

<table>
<thead>
<tr>
<th>Strategy and compliance</th>
</tr>
</thead>
</table>
| Does my organisation have a social media strategy?  
| Are my social media policies compliant with any relevant national, international or industry-specific rules and regulations? |

<table>
<thead>
<tr>
<th>Governance</th>
</tr>
</thead>
</table>
| What governance systems with measurable criteria (KPIs) do I have in place?  
| Have policies and guidelines been defined?  
| Are there mechanisms in place to leverage the customer insights and lessons learned from social media monitoring? |

<table>
<thead>
<tr>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are the employees aware of the policies and guidelines? Have they been trained?</td>
</tr>
</tbody>
</table>

Knowing how the social media governance situation looks like within your organisation comes with many benefits such as:

- Recognition strategic opportunities
- Enhanced competitive advantage
- Efficient recruitment
- Cost reduction
- Generate revenue
- Valued relationships
- Control strategic, operational, reputation, legal, and confidentiality risks

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**Social Media Excellence**

EY Social Media Governance Maturity Model

<table>
<thead>
<tr>
<th>Social Media Monitoring Controls, Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media Awareness Trainings</td>
</tr>
<tr>
<td>Social Media Governance Framework Policies, Guidelines</td>
</tr>
</tbody>
</table>

0 - None  
1 - Initial  
2 - Repeatable  
3 - Defined  
4 - Managed  
5 - Optimized
Section 2

How do companies evaluate, strategise and invest in social media?

How do Indian brands think and function digitally?

The first part of the study focused on how far the brands have reached in their digital journey as compared to 2013, across various parameters. We highlighted how they managed to do that, what worked for them, and what they did do to achieve their objectives and execute their social media strategy.

A social media strategy is linked to business outcomes. Marketing objectives are translated into a digital strategy. In fact, an overarching digital strategy is always derived from business objectives. A brand leverages the digital medium in several ways and “social” is at the core of it. To simplify it, we can put the context in the following arrangement.

Establishing a social media strategy involves defining your business goals. Using digital and social media forms part of the overall marketing strategy to achieve these goals. This requires auditing of current efforts, planning for the next step, understanding the target audience, preparing a content strategy, executing campaigns and measurement just to draw the next line of attack.

A social media strategy goes beyond putting an update on a brand handle. It always starts by answering the need to be on social media and a plan to achieve milestones. It is linked to a high level digital plan of the brand, which wants to leverage social media, for example, to increase brand impact or reduce the cost of servicing or perhaps generate more leads. It should also elaborate on the Governance framework, which will define responsibilities for the digital and social media initiatives within the organisation in terms of planning, approvals, managing, escalation and measurement of social media initiatives.

According to an article in Forbes¹, most social media strategies fail because the strategy is not aligned to the core values of your business. A brand’s presence on social media is a must and organisations are now investing time, effort, money and people to make their brands stand out among the clutter. Moreover, there is also this challenge to measure the RoI on social media investments. This is all linked backed to the overall digital and social media strategy.

Defining a digital strategy is a process where a brand states the performance indicators or goals it wants to achieve by leveraging digital media.

Employing mobile, website, social media, SEO, display advertising, SEM form part of the overall digital vision.
In order to find out how brands in India that are savvy in social media strategise their social initiatives, we started by asking them a very basic question to understand if their strategy is linked to business outcomes. This would also help us understand how Indian brands are becoming more serious and aware about having a formal set of goals and a solid plan in place before employing a wide variety of online tactics.

We found out that a whopping 83% said that their social media strategy has been aligned to the business vision, whereas around 11% of the brands did have a social media strategy and was not linked to any performance indicators.

“Today, a ‘brand’ is no longer only about what it tells its potential consumers, it is more about what one potential consumer tells another. This is why social media has become such an important tool for brands around the world. Success in this space is defined by how positively a brand has managed to influence a turnaround in how it is perceived, but this isn’t possible if a brand is unwilling to forget what it already thinks of itself. The key to a great social media vision lies in a brand’s effort to unlearn how it is already perceived by its consumers, and relearn how it is perceived by its social media audience. Identifying keywords that describe what it already is, will lead to keywords that it must aspire to be. These keywords determine what a social media vision should be. However, a brand’s social media vision has to blend into the essence of its larger company vision; else this exercise is futile. Social Media is a great platform for brands to connect with people. Some of whom will turn into potential consumers, while most of them will turn into brand ambassadors. A good social media vision is one, which helps a brand build strong brand ambassadors that help the social space positively consume everything it does. If it manages doing so successfully, the consumers will come.”

-Mihir Bijur, AGM, Social Media & Corporate Communications, shaadi.com

### Planning and internal resources

A survey conducted by Adobe says 76% of marketers feel that marketing has changed more in the last 2 years than in the last 50 years. Thanks to digital marketing. A successful digital marketing roadmap requires team work. A social media-savvy brand clearly states roles and responsibilities of teams and persons involved in day-to-day management of a brand’s social presence within a certain Governance framework. It involves a considerable amount of planning and resourcing before the implementation stage. There are a number of parallel tracks running for a brand/marketing team in terms of planning and coordination of a social media campaign. It tends to get more and more complex when you have an integrated campaign and a channel-specific content plan. At the end of the day, a smart social media strategy is all about team work.

We wanted to explore how social media-savvy brands in India function in terms of internal coordination and external relationship with various execution partners or an agency. Moreover, we aimed to find out how organisations are embracing social media internally and building teams that plan, manage and measure marketing programs. These dynamics will give us an insight into how an average day in the life of a brand team looks like.

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32% of social-savvy brands in India depend absolutely on the internal core team for strategy and implementation of social media initiatives whereas majority of 58% brands have a hybrid model where the internal core team also consists of social media agencies and consultants. However, up to 11% of brands in India still outsource it entirely to external partners. The most preferred option adopted by Indian brands in handling social media operations is a balanced one with a combination of internal and external resources.

Managing a brand’s presence on social media a full time job and requires dedicated resources.

We also wanted to find the total number of resources in the internal core team who are responsible for strategy and implementation.

We found out that 68% of teams consist of up to three dedicated resources that are entirely responsible for end to end operations.

Some social-savvy brands in India even have up to 10 team members looking after its operations in social space. Effective execution of social media strategy depends a lot on how the organisation is structured and which department leads the way.

Ownership plays an important role and sometimes a lack of Governance framework can add to the chaos. Since, Social media is a complex web of cross functional teams with lot of interdependencies, approvals and processes. In 2013, 76.7% of social-media savvy organisations responded that they have their marketing department handling social media with the rest being handled by a cross functional team/across functions or by the PR/communications team. This trend has not changed much in 2014, but what’s interesting to know is the emergence and involvement of new departments as the organisations are moving up the maturity ladder.

According to an op-ed on Technorati, more than 50% of employee respondents surveyed said “someone in marketing” handles social media. For obvious reasons Marketing, PR and Customer Service have a major stake and decision making authority in social media operations. However, in 2014 we found out new departments such as Legal and IT department have made headway too. However, Marketing, Communications and PR department leads with 94.74% whereas Legal, HR and IT are at 26.32%, 26.32% and 15.79%, respectively.

How many internal full time employees (including those who co-ordinate with/manage external partners) are involved in social media engagement initiatives and operations?

<table>
<thead>
<tr>
<th>Number of People</th>
<th>Percent</th>
</tr>
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<tbody>
<tr>
<td>1-3 people</td>
<td>68.4%</td>
</tr>
<tr>
<td>4-10 people</td>
<td>21.1%</td>
</tr>
<tr>
<td>10-15 people</td>
<td>10.5%</td>
</tr>
<tr>
<td>&gt;16 people</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Which department(s) in your organisation are integrated or involved with your social media offerings?

Which department(s) in your organisation are integrated or involved with your social media offerings (Planning, Operations, Oversight etc.)? Please select all that apply.

According to an op-ed on Technorati, more than 50% of employee respondents surveyed said “someone in marketing” handles social media. For obvious reasons Marketing, PR and Customer Service have a major stake and decision making authority in social media operations. However, in 2014 we found out new departments such as Legal and IT department have made headway too. However, Marketing, Communications and PR department leads with 94.74% whereas Legal, HR and IT are at 26.32%, 26.32% and 15.79%, respectively.

Do you use Social Media for any other reason in addition to connecting to your customers?

In 2013, we also found out that Social media is being increasingly used for thought leadership and internal communications, recruitment, and CSR in addition to marketing. 34.6% of the organisations said they use social media for thought leadership and 26.9% said they use social media for CSR. Increasingly the HR department is leveraging social media for internal communications.
**Implementation**

Social and mobile are increasingly changing the way brands are engaging with their audiences and customers. However, its implementation is very much dependant on external partners such as a digital agency, integrated agency, management consultants, PR agency and other partners to execute social media campaigns.

**Do you have an agency which looks after your Social Media requirements?**

![Pie chart showing 79% Yes and 21% No.]

Out of all respondents surveyed 73.68% prefer a pure play digital agency compared to PR, ad agencies, or freelancers. There are integrated agencies who take the fourth place in terms of preference just after PR agencies that have over the recent years developed digital capabilities. Pure play digital agencies are mostly preferred perhaps because they are technically equipped and quick enough to adapt and learn every changing digital trend. They also bring with them specialised skills and cater to almost all digital requirements of a brand, by being a one stop shop.

However, large organisations may work with multiple agencies depending on their requirements for different campaigns. On the other hand there are several digital shops emerging because many brands have tight budgets and are focused on execution. Many mainline agencies, which have now developed a digital division bring with them a legacy of communication strategy while the smaller compact pure play digital shops are focused on technology and infrastructure.

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One important thing to note is that brands have now started to employ management consultants and consulting firms are gradually moving into digital space with wide array of services right from UI, UX and Technology to Governance, Maturity Assessment and Digital Strategy. One of the reasons could be that some brands who have started early and reached a certain stage in maturity want to focus on customer experience, innovation, governance or perhaps rethink the business design along the lines of digital transformation. This trend is a recent development and important to keep an eye on.

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**78.95% of social media-savvy brands in India rely on an agency for their social media requirements**

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**Give us details on the types of agencies/Social Media resources you use for executing campaigns. Please select all that apply.**

- Digital Agency
- In-house team
- PR Agency
- Advertising Agency with a Digital arm
- Free Lance individuals/ Consultants
- Management Consultancy for Strategy...

![Bar chart showing percentages of agency preferences.]

73.7% Digital Agency
63.2% In-house team
36.8% PR Agency
15.8% Advertising Agency with a Digital arm
10.5% Free Lance individuals/ Consultants
5.3% Management Consultancy for Strategy...
Campaign deployment

Social media campaigns are now an integral part of marketing mix. Indian brands are leveraging these campaigns to encourage customer loyalty, create brand impact, provide customer service or even a quick dipstick to gather customer insights. A lot has also changed in terms of deployment of campaigns from previous years. Mobile ads have gained prominence as much as social ads have become mainstream in the digital media plan. Facebook and Twitter are now used to drive app installs, thereby, giving birth to CPI (cost per install). Brands are now seen leveraging Vine and Instagram to add in another touch point and perhaps even be bold enough to experiment and learn.

Indian brands have evolved in several ways. It is fascinating to learn what do their campaigns consist of and what triggers their decisions to deploy their next campaign. Moreover, probing them further, we were interested to know the timelines, the time taken to turn an idea on a drawing board into a pixel on consumer’s screen.

How do you plan and execute your social media campaigns?

More than half (52.63%) of surveyed brands in India prefer and create a 360° integrated campaign and then rather extend their mainline campaign on social media as an afterthought. This is a remarkable swing since the past couple of years since the focus has shifted from a mere extension to a more holistic approach. It is important to note that the level and quality of integration may vary from brand to brand depending upon their presence and budgets but the trend clearly show that Indian brands now prefer an integrated approach. To add to this change in thinking, social media-savvy brands also prefer campaigns exclusively designed for social media. This is the second-most preferred campaign type at 21.05%. Designing a campaign just for Facebook and Twitter is on a major decline at just 10.53%. 360° campaigns are in for overall marketing effectiveness. Now let us have a look at those decision drivers that make a brand deploy a campaign.

Market trends (73.68%) and Customer Insights (63.16%) are two important contributors, which drives a social media campaign for an Indian brand. Only 15.79% brands create a campaign based on competition activity. At least one brand has “sales targets” as one of the objectives for campaign deployment. This is an important piece of information and an indication of moving toward social commerce.

What is the average time spent on a Social Media campaign from creating the campaign brief until the campaign ‘Go Live’?

42.11% of the brands typically up to three weeks to design and deploy a social media campaign whereas 31.58% of brands take up to two weeks.

At least one brand is known to deploy a campaign in less than a week.
From 2013 report: Have you organised any exclusive deals/promotions for online fans?

- Yes: 64.6%
- No: 14.6%
- Maybe we will organise in the future: 20.8%

In 2013, we learnt that exclusive deals and promotion for fans on social media was a growing trend. 64.6% of brands surveyed in 2013 organisations said they have organised exclusive deals for online fans and 20.8% said they are likely to organise in the future. More than half of the surveyed organisations said they have speeded up processes or have shown a special favor for their online fans and followers that they will not normally do for their offline customers.

“Influencers and bloggers are early adopters, have high online following/reach & always stay ahead of mass for testing new technology/product or services, this is major reason brands have started leveraging them for marketing.

Following are few ways with which brands usually leverage them:

1) Review of new products, services & offering by offering them early access. (Example: Sending mobile devices way before launch or giving fashion accessories for testing)

2) Outreach using their assets (blogs/Instagram/YouTube/Twitter/Vine) or by sending them regular content (PR) or inviting them over events.(Example: CitiBank did #HappierDiwali & #OMGSale campaign purely using influencers & observed nearly 200% increase in sales)

3) As a content creator for creating content that can be use as marketing for influencing normal audience. (Example: Gionee creating content with bloggers & doing digital media push to amplify it)

4) Brand Evangelists & Guardian: Helps in feedback, research & also acts as beta testers for the future product of a brand & suggest add-on features that can be included in future releases. (Example: all major mobile OEM’s, automobile & FnB brands).

5) As ORM (online reputation management) by creating positive sentiments.

6) Brand Ambassadors/Hosts as a face of the company, this helps in creating trust among audience & helps in uplifting the brand image.

7) Brand giveaway hosted on bloggers/influencers platforms (can be blog/Instagram/twitter/youtube or others) to giveaway products.

Today, consumers acts like ROBO (Research Online & Buy Offline). Influencers have large loyal audience; they can shape opinion of people and is one whom people look up to advice while making big decisions. An authentic review or feedback of online influencers plays a major role in the purchase behaviors of users. Brands are clearly seeing ROI out of this & keen in developing more avenues of native advertising by utilising bloggers.”

- Honey Singh, honeytechblog.com
Insights into integrated campaigns

In the previous part of this section we found out that Indian brands are investing more in integrated marketing efforts than a standalone campaign on a social network. Of late, we have seen more brands adopting this kind of promotional campaigns where a consistent message is published across mediums at multiple stages to ensure better campaign effectiveness. The channels and scale can vary but this approach connects well with the intended target audience. We wanted to dive a bit deeper and ask a bit more to get some more insights into integrated campaigns from social media and digital point of view.

What is the average number of Social Media platforms that you integrate in a campaign?

Currently, marketers have enough communication channels and platforms at their disposal to simultaneously use and create a campaign to generate a buzz or to advertise products and services. Apart from traditional means, we now even have options within mobile, social and web. Not that there’s a sure fire formula for a successful integrated campaign but what we found is that more and more marketers are executing campaigns with consistent messaging across mediums and integrating them for cross pollination of traffic. Although organizing and coordinating a campaign of this nature is a colossal task, measuring its success from a digital standpoint can provide some additional insights on RoI from digital vis-à-vis traditional medium, for each campaign.

Do you inform your audiences about your Social Media presence and campaigns in Print/TV and other mediums?

86.67% of respondents opine that they do let their audience know about their online activities through the print medium and 46.67% also use mobile ads to convey the same. These two remain the most preferred means in an integrated campaign. POS, On-ground and Packaging remain the third-most preferred touch points at around 33% to communicate about a brand’s social media presence or a campaign. TV remains least favoured at 20%. According to a report by Millward Brown, to drive reach and frequency, it can be more efficient to use digital rather than more TV. At least one brand is even utilizing all outbound corporate communication as a part of their multimedia plan.

If you answered Yes in the previous question, please select which mediums do you use to publicize your Social Media presence/campaigns?

86.7% of social media savvy Indian brands integrate up to 5 social platforms as a part of the larger integrated marketing campaign. 31.58% use only two.
Mobile and CRM

In early 2014, Gartner\(^2\) released some figures, which basically said that smartphone sales have surpassed feature phone sales for the first time ever in terms of worldwide sales and that India is the world’s fastest growing smartphone market. Mobile today plays a very important role in a digital strategy and that also means high spending on mobile ads, focuses on better UX and increased dependencies on apps for a digital marketer. As a “Mobile First” philosophy becomes pervasive, we wanted to know mobile-specific priorities of a digital marketer in India.

What mobile/tablet specific initiatives have you already initiated or plan to initiate in the near future. Please select all that apply.

- Mobile apps: 73.7%
- Responsive sites: 63.2%
- Mobile/tablet only campaigns: 42.1%
- Loyal community: 5.3%
- Other (please specify): 5.3%
- None: 21.7%

From 2013 Report: Have you created a mobile app?

- Yes: 50.0%
- No: 28.3%
- No, but plan to: 21.7%

In 2013 we asked them if they have created a mobile app and half of them said yes. It has gone up to 73% in 2014.

73.68% of respondents said they have initiated or plan to initiate mobile apps to push the brand. Building and promoting an app is the most important mobile-specific activity, followed by creating device agnostic responsive sites at 63.16%. Mobile advertising comes as the third priority at 42.11%.
Over the years, Indian brands have evolved in terms of their objectives and functions on social media. Taking the engagement quotient further, we have seen many Indian brands listening, helping or servicing their customers on social media platforms. Although the journey in Social CRM space has just been initiated by many brands, it would be important to know how brands are leveraging social media to gain consumer insights and reduce the cost of servicing.

Little more than half of Indian brands do not integrate or include CRM as part of their social media strategy and 70% of them do not have a CRM Platform. Social CRM in India may be in its early stages of evolution, but we have seen some Indian brands do some engaging and award winning creative work on the CRM front.

“Indians have adopted digital very differently compared to rest of the world. We have skipped the Desktop revolution and directly moved to Smartphone revolution. Today more Indians access internet on their smartphones, rather than on laptops or desktops. Hence the behavior of Indian users is also quite different. Indians now have second largest population on Facebook and Twitter. We are also the second largest mobile app downloaders in the world. This clearly points to fact that we Indian have embraced digital through mobile apps, rather than in a more traditional way. Smartphones have become our Gateway to the digital world - We listen to music, watch videos, post status updates, click pictures, keep in touch with friends, do online shopping all through our smartphones. And because smartphones are getting cheaper, it has become affordable to everyone!”

- Arun Prabhudesai, Trak.in

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From 2013 Report: Have you conducted any social media research for your organisation? Can you share what kind of research you have conducted?

<table>
<thead>
<tr>
<th>Purpose of Research</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To understand customer behaviour</td>
<td>34.4%</td>
</tr>
<tr>
<td>Competitive benchmarking</td>
<td>25.0%</td>
</tr>
<tr>
<td>To get customer feedback</td>
<td>40.6%</td>
</tr>
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</table>

Over 40% of the brands surveyed in 2013 conducted social media research to get customer feedback and over 34.4% to understand customer behaviour.
Challenges and key focus

Managing your brand’s social media presence is a full-time job and with so many things to do in such little time. Every digital marketer faces challenges from the planning stage, to ensuring coordination among creative, social media, and media agencies and eventually execution and studying analytics, there are several other challenges that a digital marketer faces. You will be able to relate to and share the same concerns as a digital/social media marketing professional.

Identifying and reaching out to the right target audience on social media continues to be the top-most challenge for Indian brands, followed by monetary constraints. It turns out that getting budget approvals for social media initiatives is as much a challenge as calculating the RoI and success metrics for the amount spent. Both are a close second.

A marketer will get more bang for the buck spent if identifying, targeting and acquiring the target audience was simplified or decoded. Moreover, one should remember that creating the content strategy and execution of rest of the plan also very much depends on how you define your target audience or personas of your digital audience.

Defining social media vision and strategy also seems to be an important pain point for digital marketers. A clear objective can be translated into actionable milestones for a brand in its social media journey. This leaves a lot of room for brands to go back and rethink about digital transformation.

As brands reach the next stage of maturity on social media, so do the consumers. Rising expectation for speedy resolution on official brand pages also is a critical challenge. This calls for the need to have crisis manuals and social media guidelines for social media-savvy Indian brands.

It is widely known that calculating returns on social media investments is difficult and tricky. In 2013 we found 81% of brands measure platform-specific parameters including “Likes” and “Reach”. We go a step ahead in the next section of this study to find out what are Indian brands measuring and how. But for now, let’s see what Indian brands want to do to improvise and better their social media initiatives.
Furthermore, the definition of social media strategy is the top priority for more than 68% of the Indian brands. Social media is critical for the success of your brand online and that would require a roadmap with targets and milestones, an execution plan and defined metrics to measure the success. A successful digital strategy should involve people, processes and technology and embrace social media at an enterprise level. Employee training and resourcing remains the second and third improvements that brands would want to partake. Also contrastingly, in the first section we found out only 5% of respondents consider Social Media Policies & Governance framework as one of the challenge.

It is never too late for a brand to go for an overhaul and rethink its digital vision with more involvement from senior management and focus on employee training and governance, before drawing the next line of attack.

What activities would you focus on further this year to deploy campaigns effectively? Please select all that apply.

- Social Media Strategic Definition: 68.4%
- Employee Training: 36.8%
- Resources and budgets: 31.6%
- Better Agency coordination: 26.3%
- Other: 15.8%
- In-house Social Media Team size: 15.8%
EY is positioned to help our clients manage the complexities of social media and develop a winning game plan.

A winning game plan is holistic and is centered around four competencies...

- Defining a holistic vision and strategy
- Defining & implementing a formal governance model, processes, policies, and roles
- Tracking the right KPI’s and Metrics to measure success
- Identifying key social media risks and mitigation strategies
- Validating compliance to legal and regulatory policies
- Integrating social media into current marketing strategies, campaigns, and channel mix
- Optimizing effectiveness of marketing, sales, and customer service across channels
- Applying consistent, effective branding across all digital properties
- Building robust and scalable social media data model and architecture
- Coordinating collection, management, and analysis of social and CRM data
- Improving segmentation, targeting, and customer experiences
- Driving key decisions from social media data

Our full life-cycle of social media services can be tailored to your business situation, goals, and objectives.

From assessment to design and implementation, each program is targeted to driving specific business outcomes.
Section 3
How do brands effectively use Social Media to measure success?

Identifying key success metrics

The previous section detailed how companies evaluate, strategise, deploy and invest in social media. However, from a business perspective, to prove that these social media investments are truly warranted, businesses need to be able to accurately track and trace how social media is influencing and impacting the bottom line.

In this section, we explore what social media savvy brands measure and the methodology.

Defining metrics around social media marketing has been challenging enough and for a while many people said it simply could not be done. Now, however, we are learning that social media measurement is possible—just not always using traditional metrics and methodologies.

In order to be able to understand how social media savvy brands prioritise and measure their success, let’s have a quick look at some key terms and briefly describe what they mean:

1. **Engagement:** It measures how much and how often others interact with a brand and its content in social media. Engagement metrics such as conversion rate, applause rate and amplification rate showcase audience action and include likes, +1s, favourites, number of comment, number of downloads etc. When a customer or visitor takes the time to like, favourite or comment on something a brand has posted, they are actively engaging with the brand.

2. **Social reach:** It measures the total number of people a brand is able to reach across various social media networks. It is a measure of the range of influence and takes into account shares, retweets, repins, visitors (fans/followers/subscribers), click-throughs, referral rates etc. It expands on a brand’s potential audience by measuring not just the number of followers of a brand, but the number of followers each of the followers has.

3. **Visitor frequency rate:** It segregates viewers into new and return visitors and measures the frequency with which they visit a brand’s page or site over a specified period of time. Return visitor numbers further indicate the depth of engagement and strength of a brand’s social network.

4. **Visitor growth rate:** It measures the change in a brand or company’s following on social media networks. Tracking visitor growth rate on each individual network will determine the average rate of increase or decrease in a brand’s fans or followers over time. Expressed in percent-change over time, the growth rate of a brand’s visitors/audience depicts the social media momentum.

5. **Brand sentiment:** It refers to the emotion behind a social media mention. It is a way to measure the tone of the conversation. Sentiment adds important context to social conversations. Without it, measurement of mentions alone could be misleading. Sentiment is usually measured as a ratio of positive to negative mentions.

6. **Brand mentions:** These are the total number of times a brand or site is mentioned on the webpage or social media network over a particular period of time.

7. **Share of voice:** This gives details of what percentage of mentions within an industry is about a specific brand and what percentage is about the competition. It also helps to understand how a brand or company is performing in comparison to competitors. The underlying idea is that an improved SOV indicates more people are talking about a brand as it reaches more of its audience.

8. **Share of total visitors for industry:** It gives details of what percentage of visitors within an industry is to specific brand’s website or page compared to what percentage of visitors is for the competition’s websites or pages.

Engagement, Social Reach and Visitor Growth Rate are the key social media metrics tracked by social media savvy brands.
While Engagement (94% of brands surveyed), Social Reach (89%) and Visitor Growth Rate (72%) stand out as important metrics tracked by most social media-savvy brands, Brand Mentions (61%), Brand Sentiment (55%) and Share of Voice (55%) are also popular metrics of high value.

In 2013 SMMITS survey, 81% of the social media savvy brands said they measure their social media efforts through platform-specific parameters including "likes" and "People Talking About This." However, almost half of the organisations surveyed said they had not measured revenue from their social media efforts.
“For any social media campaign today, there are 3 core success metrics - Brand’s activity, Audience interaction and Business opportunities.

Let’s have a closer look at these: Quantifying brand’s activity is very important to know what goals you want to achieve, how much efforts and time you are putting in, what is the overall investment and who are your influencers for that campaign. Talking about influencers, it’s just not the number of followers they have rather it’s the ripple effect that one should be looking forward to.

Then comes Audience interaction, I am consciously not using the word engagement here because it is not only about number of retweets, shares, likes and comments. It is more than that, it’s a direct conversation that your campaign should drive on user’s end. So it’s important to know how many people reached out to you directly about your campaign or product. An extended aspect of this is the sentiment you create with your campaign. A before-after survey is the typical way to measure the impact of the campaign, another thing that many brands now are doing is using social media monitoring tools to focus on negative sentiment immediately.

And the last one is about numbers that will make sense for business, how many clicks on your social posts, how many visits to your site, how many new subscribers/inquiries and so on. In short how many new Business opportunities.”

- Harsh Ajmera, digitalinsights.in

Taking success metrics back to business objectives

As we have elaborated in the previous section, business and marketing goals of an organisation define its social media strategy. The metrics that companies consider often tie back to the goals of their digital and social media strategy.

For some brands, goals are as simple as driving traffic and measuring conversions. For many, however, success may be measured in the form of cost savings from handling customer service issues on Twitter instead of over the phone.

What Business Metrics do you attribute to Social Media?

Conversions, leads, RoI and sales emerge as critical business metrics to measure success of social media efforts.

Close to 80% of social media-savvy organisations attribute conversions (through campaigns/referrals etc.) to social media efforts.

Leads Generated (47%), RoI (31%) and Sales (21%) are other key business metrics that organisations believe are affected by social media activities. However, just 10% of respondents attribute customer service costs and customer acquisition costs to social media.

According to Digital Insights\(^2\), B2B marketers using blogs generate 67% more leads.

There is no universal way to measure every social media initiative, and these calculations are largely at the disposal of a brand and its social media goals and objectives.
Majority of businesses have an in-house team that handles social media metrics

Our survey finds that a majority ~ 58%, of social media savvy organisations in India employ an in-house team to handle social media metrics, whereas the remaining 42% of organisations prefer to outsource metrics to an external agency.

Are your Social Media metrics measured in-house/by an agency?

![Chart showing 58% in-house and 42% agency]

The choice between in-house and outsourcing is usually dependent on two key parameters – the kind of social engagement a brand needs, and the brand’s understanding of social media.

There are several aspects of social media that can be outsourced, such as monitoring and analysing activity on channels, developing applications, media buying and content creation, which are unique skills that are difficult to build in-house.

However, it is critical that some aspects are done in-house. Key marketers should own the overall strategy function, drive engagement and conversations with customers and be involved in accurately representing the brand voice on social media channels.

Moreover, a company’s understanding and comfort level in managing social media is a key determinant to outsourcing this function or not. Many companies still struggle with understanding the benefits of social media, defining their objectives and tracking the right metrics.

How many internal full time employees (including those who co-ordinate with/manage external partners) are involved in social media analytics?

![Chart showing distribution of employees]

Majority of social media savvy organisations have small teams of less than three full time employees involved in social media analytics. Nearly 89% of respondents said that they employ three or fewer internal full time employees who are involved in social media analytics. 11% of respondents said that they employ larger teams of 4-10 people while none of the respondents suggest they have teams larger than 10 people.

Do you have an in-house digital expert?

![Chart showing distribution of responses]

As per the SMMITS study conducted in 2013, 70% of all respondents said they have an in-house digital expert in their organisation.
Brand Monitoring

Do you monitor your brand sentiment through any social listening tool?

A majority of organisations monitor their brand sentiment through a social listening tool. 63% of organisations confirmed to using a social media listening tool to track their brand sentiment. The rest of the 37% of organisations said that they do not use any tool to track brand sentiment, even though 55% of all organisations said that brand sentiment is a metric that they measure, as shown earlier.

Brand sentiment refers to overarching emotion or sentiment (favourable or unfavourable; positive, negative or neutral) of a brand in the social media universe. It is usually measured as a ratio of favourable to unfavourable mentions of a brand in the online universe. Just tracking the number of mentions of a brand may not be an accurate measure and sentiment adds an important context to social conversations.

Brand sentiment can be used to evaluate brand health, for competitive research or to evaluate campaigns and other initiatives.

As a company’s online footprint increases, it becomes close to impossible to track the sentiment manually and there are a host of tools – free and paid services that can help in tracking and evaluating the same.

If you answered ‘Yes’ to the previous question, what are you using to monitor your brand sentiment?

There are several free and paid tools available to companies that enable them to perform social media analytics. Close to 42% of social media savvy organisations responded by saying they use Radian6 to monitor brand sentiment on social media. Meltwater (17% of organisations) and Simplify 360 (8% of organisations) emerged as other popular tools being used to monitor brand sentiment.

Companies also mentioned Iristrack, Social Mention, Hootsuite and Netbase as the other tools used.
Impact of brand monitoring

Organisations are unanimous in their belief that social listening tools and brand monitoring have reaped benefits and advantages for their companies. Better understanding of the perception of the brand, effective management of customer queries and effective resolution of requests are some of the major benefits that organisations have realised by combining social listening with social media marketing.

What has been the impact on your brand since you combined Social listening with Social Media Marketing?

- Understood the perception of the brand better: 69.2%
- Gained better customer insights: 53.9%
- Helped in new product development: 15.4%
- Managed customer queries more effectively: 61.5%
- Resolved requests more effectively: 61.5%
- Gained better competitor insights: 38.5%
- Provided better customer experience: 38.5%
- Supported sales: 15.4%
- Generated leads: 38.5%
- Other: 8.3%

Close to 70% of all companies, that said they use social listening tools, admitted to having a better understanding of how their brand is perceived in the social media universe. 61% of all organisations reported more effectively managing and resolving customer queries and requests. Moreover, 54% said they gained better customer insights, 38% said they gained better competitor insights, were able to provide better customer experience and generated leads.

Other impacts of using social listening and monitoring tools have been in helping new product development and supporting sales.
EY social media monitoring and analytics

We adopt a robust approach to help your teams understand the context of the insights they will receive and depth of insight available to them.

**Input**

Monitor Social Buzz from customer, competition, market and employees on
- Blogs
- Forums
- Consumer Review sites
- Social networks

**Output**

Key Insights on
- Brand monitoring
- Advertising and marketing effectiveness
- Industry monitoring
- Competitive intelligence
- Risk and Compliance
- Product quality
- Product and service development
- Employer of choice
- Crisis communication
- Stakeholder management
- Product misuse/counterfeit

**Account Management Support**

<table>
<thead>
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<th>Setup</th>
<th>Listen</th>
<th>Filter &amp; Analyse</th>
<th>Interpret &amp; Reporting</th>
<th>Inform</th>
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<td>Market trends</td>
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<td>Classify conversations</td>
<td>'In-Depth Analysis'</td>
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<td>Segment conversations</td>
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Getting valuable insight from social media will require your brand to understand and feel comfortable with the data, filters and levels of interpretation that they will receive.

Our teams will work with you during the set-up (and ongoing service delivery) so that you can quickly get to the right actions and level of detail by defining the tiering of reports that they require from ‘dashboards’ to ‘In-Depth Analysis’.
Section 4
The next big thing

What according to you is the next big thing that you would like to introduce to your Social Media Marketing capabilities in the near future? Please rank in order of importance (1 being most important).

Brands surveyed stated that they are looking to introduce Social CRM and Social Commerce as priority items on their social media agenda, followed by customised ads/campaigns and gamification. A little less than half of the customers surveyed earlier mentioned they were already integrating their social media data with their CRM systems; however, as brands start collating data from various touch points, and getting a single view of the customer, they will be better able to determine their customers' preferred ways of engaging with them.

For brands, using these preferred channels to manage customer relationships and track previous interactions will give them better insight on how to sell and market customised content through social platforms. Leveraging the mobile internet revolution and check-ins, brands can push targeted and localised/hyper localised content and offers to audiences on their social media platforms for fruitful engagement.
How to get the best out of this study

1. Forward this study to various people within your organisation and discuss how social media is relevant to various departments within your organisation and how they can effectively utilize the medium if they are not doing so already.

2. Compare your organisation’s use of social media with that of social media-savvy organisations discussed in this study. Check the level of social media maturity within your organisation.

3. Discuss what needs to change or worked upon within your organisation – whether it is about developing a social media RoI model, creating a more robust monitoring and analytics system or a social media governance policy, familiarizing your key employees on usage of social media, or understanding your customer’s behavior more to better engage with them and deriving more benefits from your social media efforts.
EY

EY works with forward thinking social media professionals and organisational leaders to answer key questions to accelerate the social transformation process within their organisations.

Insights
- How do we know what we are doing is the best for our fans and customers? Are they in sync with their expectations? How do we benchmark this against competition?
- What are the best practices or global standards that we should be aware of and can learn from?

Strategy
- How do we familiarize the various departments in our organisation with digital and how do we make digital relevant for them?
- We have established our social media communities and have done great campaigns for fans online. Now what is the next stage that we should take our organisation to?
- We have leaped into digital, but do we have the guidelines in place for our teams and employees? How do we identify digital risks and steps to mitigate them? What is our social media governance maturity level?
- How do we identify the digital service providers and how do we bring all of them together to create a comprehensive digital strategy for us?

Analytics
- What is the state of digitization in our organisation? How do we assess the digital maturity across dimensions such as customers, suppliers and partners, investors, employees and leadership?
- How do we develop a practical RoI model for our organisation from our digital efforts beyond platform-specific parameters?
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www.ey.com/India/socialmedia
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Section 3: How do brands effectively use Social Media to measure success?

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