

VISIONCRITICAL®

COLLECTIVE WISDOM STARTS HERE

WHAT SOCIAL MEDIA ANALYTICS

CAN'T TELL YOU

ABOUT YOUR CUSTOMERS



TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
INTRODUCTION	5
SOCIAL MEDIA ANALYTICS <i>CAN'T</i> TELL YOU...	
WHO YOUR CUSTOMERS ARE	6
HOW TO SERVE YOUR CUSTOMERS	11
HOW TO MARKET AND SELL TO YOUR CUSTOMERS	14
HOW TO ENGAGE YOUR CUSTOMERS	16
HOW TO BECOME A MORE CUSTOMER-CENTRIC COMPANY	19

EXECUTIVE SUMMARY

VISION CRITICAL PARTNERED WITH THREE OF THE WORLD'S LEADING BRANDS TO UNDERSTAND WHAT SOCIAL MEDIA ANALYTICS CAN AND CAN'T TELL YOU ABOUT YOUR CUSTOMERS.

Every company wants to be customer-centric. Smart companies want to understand who their customers are, what those customers want and why they want it. They want to serve those customers in the way those customers expect—and increasingly, demand. They want to find marketing and advertising strategies that will resonate with customers, delivered through the channels those customers actually read, listen to or watch. And in the era of social media, they want to find ways of engaging those customers online and off.

**SOCIAL MEDIA RAISES
YOUR CUSTOMERS'
EXPECTATIONS, BUT
IT DOESN'T GIVE
YOU THE INSIGHT
YOU NEED TO MEET
THOSE EXPECTATIONS.**

The rise of social media has raised the expectations of consumers about the companies with which they do business. Social media also promised companies the kind of insight they needed to meet those expectations: tune into social, and you will know exactly what your customers are looking for or complaining about. Build a social media war room and you will have screens full of data detailing your customers' level of engagement and sentiment. Extend your customer relations and marketing departments with social media specialists and you will engage your customers in the kind of dialogue that lets you get inside their heads and understand what they really want. Social media promised companies a way to become customer-centric and a way to meet all the wants and needs of their customers. Best of all, thanks to an ever-growing range of social media tools, social media promised that you will be able to measure everything.

So far, however, social media analytics has failed to live up to its promise as a panacea for customer-centricity. And here's why: it turns out that **the people who participate and post on social media are not representative of your customers.**

In this report, we share intelligence from three global brands on the behavior of their customers on social media. These companies used Vision Critical's Customer Intelligence Platform to compare what thousands of people share on social with what those same customers say about what they watch, read and buy. By combining social media profile data with direct customer feedback, these companies discovered that **almost 85% of what you hear on social comes from slightly less than 30% of the social media audience—a slice that has distinctly different shopping, media and social media habits.** That means that social media analytics can't tell you what you need to know about your customers.



LURKERS
POST ONCE A WEEK OR LESS



DABBLERS
POST 2 TO 4 TIMES A WEEK



ENTHUSIASTS
POST 5 TIMES A WEEK OR MORE

SOCIAL MEDIA ANALYTICS *CAN'T* TELL YOU...

WHO YOUR CUSTOMERS ARE

Your social media audience is made up of three distinct types of customers. Social media analytics tell you about enthusiasts—the people who post 5x/week or more. But they can't tell you about dabblers (who post 2-4x/week) or lurkers (who post 1x/week or less).

85%

OF SOCIAL MEDIA UPDATES COME FROM ENTHUSIASTS BUT ONLY 29% OF YOUR AUDIENCE ARE ENTHUSIASTS

HOW TO SERVE YOUR CUSTOMERS

Enthusiasts shop differently from the majority of social media users. They're more eager to find that next great buy, and more likely to use social media in the process.

26%

OF ENTHUSIASTS SHOP FOR APPAREL IN BIG-BOX STORES COMPARED TO 14% OF LURKERS

HOW TO MARKET AND SELL TO YOUR CUSTOMERS

Enthusiasts watch different TV shows and follow different topics on social, so analytics won't predict what social media users watch, where they will encounter your ads or what kind of content they want to see from you.

42%

OF ENTHUSIASTS USE FACEBOOK TO GET THE LATEST ON COOKING, DINING AND WINE COMPARED TO 19% OF LURKERS

HOW TO ENGAGE YOUR CUSTOMERS

Influencer marketing may work with enthusiasts, but lurkers and dabblers are much less interested in influencing their friends and family and they are less influenced by them, too.

29%

OF ENTHUSIASTS CONSULT THEIR FAMILY AND FRIENDS WHEN APPAREL SHOPPING COMPARED TO 16% OF LURKERS

HOW TO BECOME A MORE CUSTOMER-CENTRIC COMPANY

The differences between lurkers and enthusiasts mean that social media analytics only offer a limited view of your customers. That limited perspective keeps businesses from becoming the customer-centric companies that social media users demand.

INTRODUCTION

Social media is one of the primary drivers of the customer revolution: the shift towards a world in which consumers expect companies to respond to their wants, needs and complaints. However, the vast majority of social media users remain relatively quiet online which means the networks that create this pressure offer a very limited picture of today's customers. Companies that steer their business or marketing strategy based on social media input face a very real risk of misreading their customers and their market.

Companies that turn to social media analytics as a marketing tool get valuable data to support their online campaigns. Social media analytics help brands measure the virality of specific messages and assets. They help marketing teams track the growth of their online audience and notice when that growth stalls. Social media analytics also help brands identify and leverage the influencers who can build and extend the brand.

But companies that turn to social media analytics to tell them about their customers—or even their social media audience—have significant blind spots. Because the vast majority of social media updates come from an unrepresentative slice of your customer base, social media analytics can't really tell you how to serve your customers. It can't tell you how to market or advertise to your customers. It can't even tell you how to engage your customers through social media.

That's why it's crucial to complement social media analytics with other ways of gathering customer intelligence—many of them enabled by the same technological and social drivers as social media. As part of the push to become more customer-centric, companies need to combine social media with other sources of insight, including transactional data, click tracking and most crucially, direct, ongoing feedback from customers.

This report shows you what you can learn about social media users when you combine social media data with solid customer intelligence.

Three global brands—a major motion picture studio, a renowned broadcasting company and a cross-category apparel brand—took a closer look at their social media audiences by turning to their insight communities: communities of customers who provide ongoing feedback through surveys and discussions.

The companies asked thousands of social media users how they shop, what they buy and what they do online. In two of these communities, as well as in Vision Critical's Voice of Market community, members also provided direct access to their Facebook or Twitter profile data. As a result, we were able to construct a picture of social media users that reflects an unprecedented level of insight not only into what customers do online and off, but why they do it.

The picture of social media users that results from this combination of customer feedback and social media data tells you what social media analytics can't—it maps out the gap between what you hear on social, and who is listening to you. It maps out the differences between the active social media users that show up in your social media analytics and the much greater number of social media customers who remain largely invisible. Most crucially, it maps out how to fill in the gaps left by social media analytics so that your company can become truly customer-centric.

**THE INSIGHT IN THIS REPORT
COMBINE DIRECT CUSTOMER
FEEDBACK WITH SOCIAL
MEDIA PROFILE DATA TO
CREATE AN UNPRECEDENTED
PICTURE OF THOUSANDS OF
SOCIAL MEDIA USERS.**

SOCIAL MEDIA ANALYTICS *CAN'T* TELL YOU

WHO YOUR CUSTOMERS ARE

If your company uses social media as one of its customer listening posts, it's crucial to understand what you're hearing and what you're missing. That means recognizing that "social media users" aren't a monolithic group. In other words, people use social in different ways. That's why we distinguish between three types of social media users:



LURKERS
POST ONCE A WEEK OR LESS

LARRY IS A LURKER

Most of the time, he doesn't post any updates on Facebook.



DABBLERS
POST 2 TO 4 TIMES A WEEK

DONNA IS A DABBLER

She posts twice per week.



ENTHUSIASTS
POST 5 TIMES A WEEK OR MORE

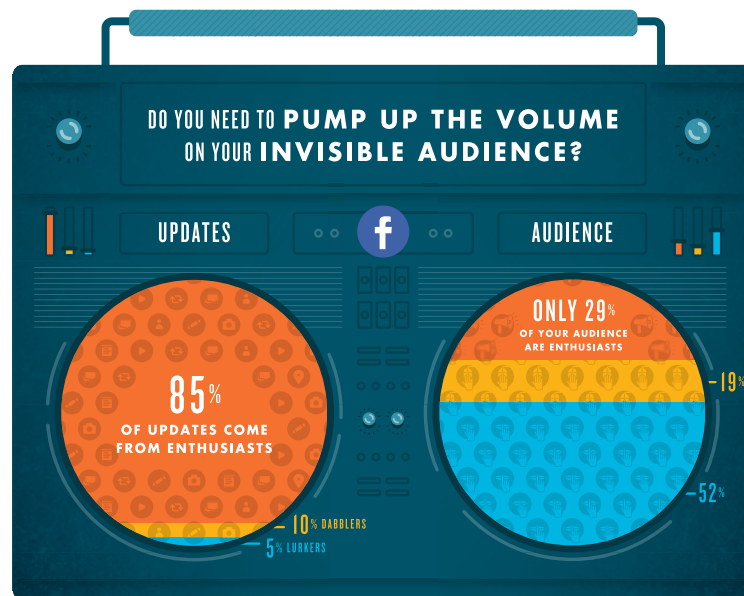
EMILY IS AN ENTHUSIAST

She posts about 100 updates per week, including links, photos, & videos.

Once you tune into social media with these three types of users in mind, you see that most of your social media audience is virtually invisible.

FACEBOOK UPDATES BY AUDIENCE SEGMENT

On average, how many times a week do you post an update, share a link or post/share a photo or video to Facebook?



EMILY UPDATES HER FACEBOOK ACCOUNT 100 TIMES PER WEEK

When you look at your social media monitoring dashboards and analytics tools, most of what you see comes from enthusiasts. This creates a problem for companies who want to use social media to get closer to their customers. The imbalance in participation means that the vast majority of customers—the lurkers and dabblers—get drowned out. **Listening to enthusiasts gives you a unrepresentative picture of your customers as a whole for three reasons: analytics tools don't reflect what happens in social media, social media users don't reflect your customers and enthusiasts don't reflect your entire social media audience.**

SUPERENTHUSIASTS: UPDATES VS AUDIENCE SHARE

On average, how many times a week do you post an update, share a link or post/share a photo or video to Facebook?



While enthusiasts make up 30% of the social media audience, more than half of what you hear on social comes from an even thinner slice. We call these folks “super-enthusiasts” and they represent the 8% of social media users who post more than twice a day.

The distinction between enthusiasts and super-enthusiasts roughly maps onto the longstanding observation that even among social media contributors, some people participate more actively than others. Eight years ago, Jakob Nielsen summarized this as the 90-9-1 rule: 90% of online community members are silent, 9% participate occasionally and 1% participate actively.

While the rise of social media means that almost 30% of users now post regularly, the underlying problem remains: the vast majority of what you hear online comes from an unrepresentative portion of your customers. And because super-enthusiasts post so frequently, they distort your social media analytics even further—more than half of what you hear on social comes from less than 15% of your social media audience.

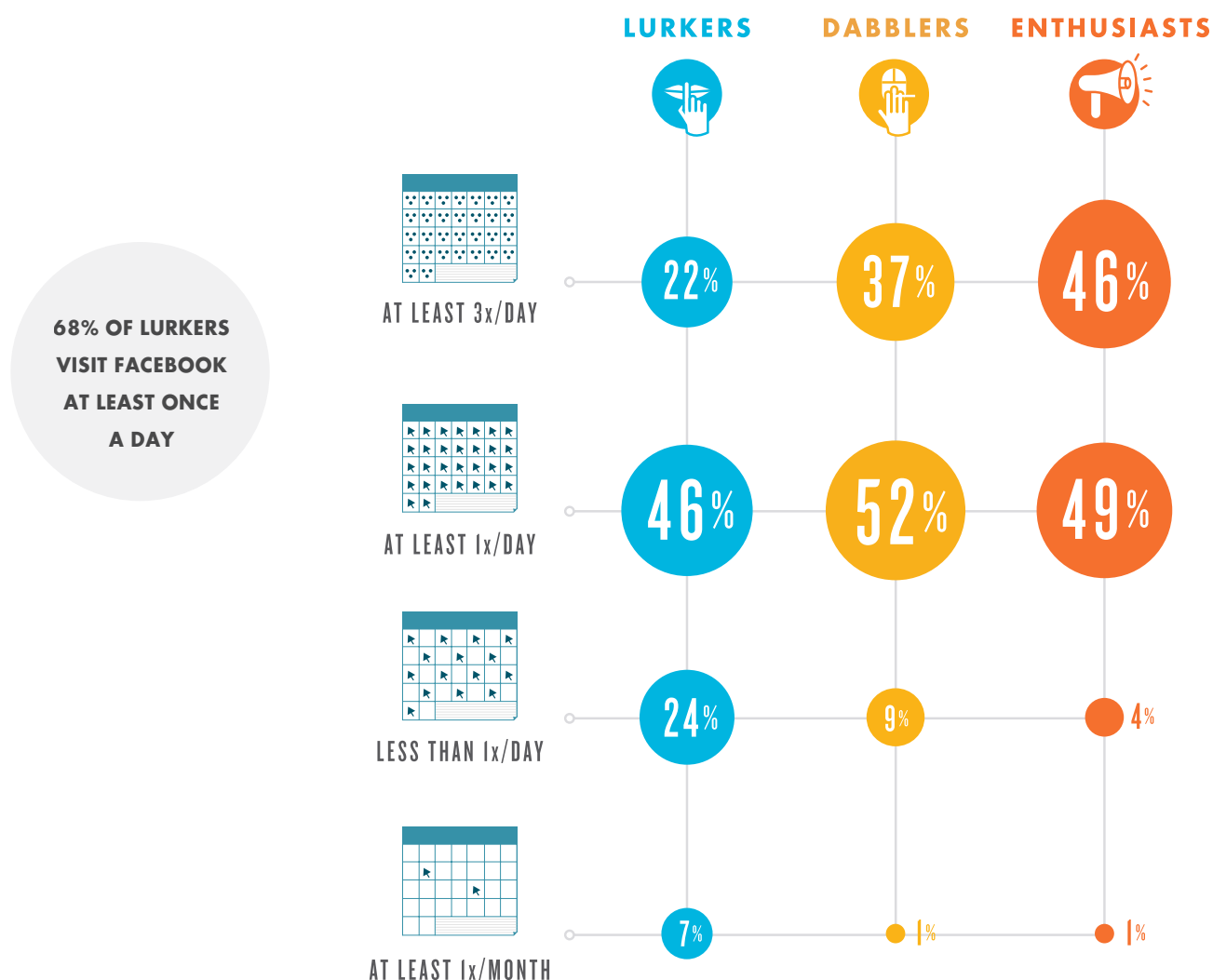
ANALYTICS TOOLS DON'T REFLECT WHAT HAPPENS IN SOCIAL MEDIA

The vast majority of social media users are relatively quiet. They can see the content their friends are sharing about you or your competitor, but they aren't posting themselves. You can't hear them, but they're listening to you. 68% of lurkers visit Facebook at least once a day, and 89% of dabblers are daily Facebook users.

Your view of enthusiasts is also limited because it's hard to see what people are doing on Facebook unless they are your fans, using your app or interacting with your content. That means you only know how enthusiasts interact with you; you don't know what else gets their attention on Facebook. (You can get a fuller picture of what people do on Twitter, but you're looking at a much smaller slice of the online audience.)

FACEBOOK VISIT FREQUENCY

On average, how many times a week do you visit Facebook?

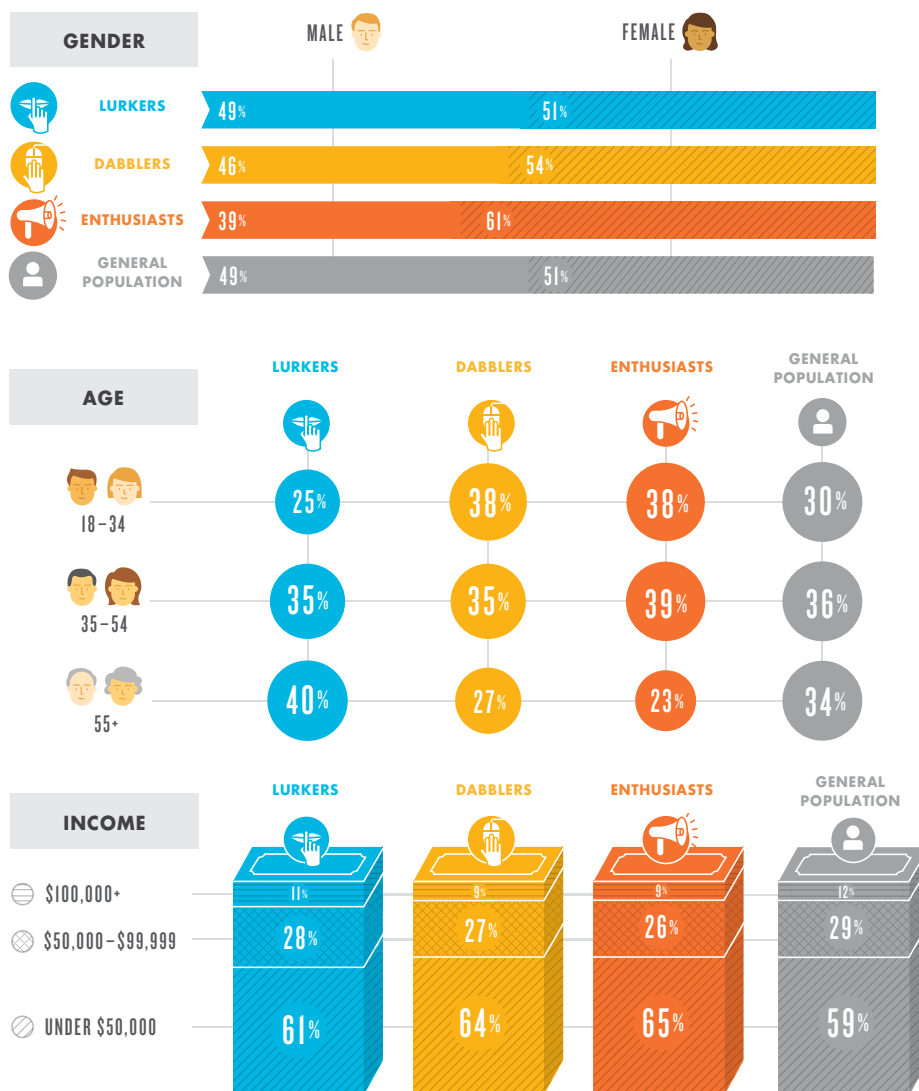


DONNA VISITS FACEBOOK AN AVERAGE OF TWICE A DAY.

SOCIAL MEDIA USERS DON'T REFLECT YOUR CUSTOMERS

Social media users as a whole are an unrepresentative slice of the customer base in most companies and industries. While 80% of the population is now on Facebook, only 25% of the population is on Twitter. The demographics of these users are still different from the overall population (even the overall online population) in significant ways.

SOCIAL MEDIA AUDIENCE DEMOGRAPHICS



LARRY IS A 57-YEAR OLD MAN WITH AN INCOME BETWEEN \$50,000 - \$99,000

THE BEHAVIOR OF ENTHUSIASTS DOES NOT REFLECT THOSE OF YOUR ENTIRE SOCIAL MEDIA AUDIENCE

Lurkers and dabblers differ from enthusiasts in a wide range of ways—differences that make a crucial difference to the way you serve, market to and engage your customers.

It's essential for companies to understand the segments within their social media audience, and the different shopping, media and social habits of each group. Because enthusiasts shop differently from lurkers and dabblers, social media analytics can't tell you how to serve your customers as a whole.

Because enthusiasts pay attention to different kinds of media, social media analytics can't tell you how to advertise and market to your customers. And because lurkers and dabblers aren't as social as enthusiasts, social media analytics can't tell you how to engage your full range of customers.

The next sections of this report map out each of those differences and explain how they affect what you can and can't learn from social media.

**LURKERS AND DABBLERS ARE
DIFFERENT FROM ENTHUSIASTS
IN WAYS THAT MATTER TO
YOUR BUSINESS.**



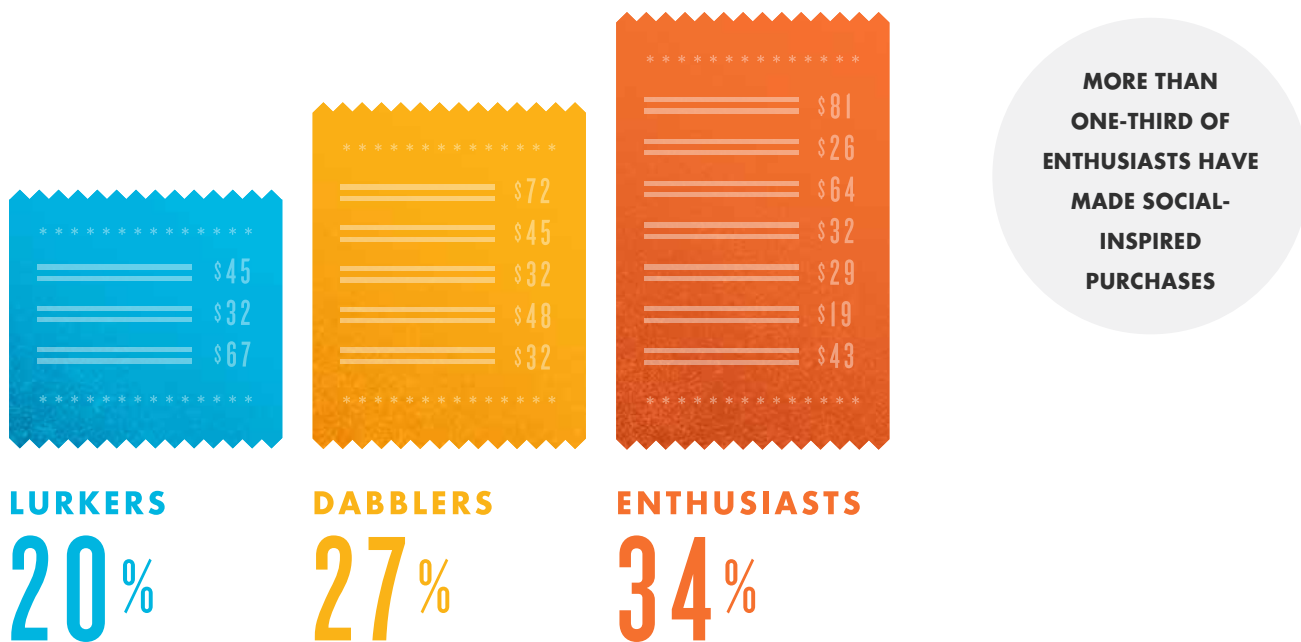
HOW TO SERVE YOUR CUSTOMERS

Understanding what your customers want to buy and how they want to buy is essential to a brand's success. However, if you're trying to understand how to serve your customers effectively, what you see in your social media dashboard can be misleading because enthusiasts shop differently from the vast majority of social media users—social media enthusiasts are more likely to be enthusiastic shoppers. More than 1 in 5 enthusiasts are “supreme shoppers” who live to find that next great buy, while only 1 in 7 lurkers share that passion. Lurkers are more likely to be “reluctant shoppers”—26% of lurkers are reluctant shoppers, compared with just 19% of enthusiasts.

Social media is one way that enthusiasts find great deals. The apparel company found that only 17% of lurkers use social media to find discounts and coupons compared to 32% of enthusiasts. Indeed, social media plays a larger role in the enthusiasts' path to purchase. Overall they're more likely to share an item on social, and then go on to buy that item online or in a store.

SOCIAL-INSPIRED PURCHASES

Have you ever purchased an item in-store or online after you shared/liked/commented on it on Facebook?



LARRY DOESN'T SEE FACEBOOK AS A SOURCE OF SHOPPING ADVICE

DONNA BUYS A NEW DRINK IN-STORE AFTER FINDING IT ON FACEBOOK

EMILY LIKES FEEDBACK ON HER PURCHASES

MOBILE ATTITUDES AND SHOPPING BEHAVIOR



LURKERS

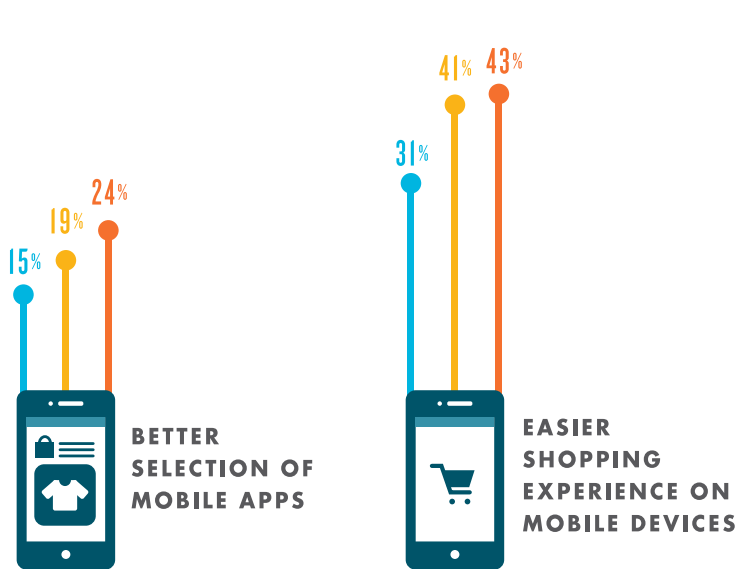


DABBLERS



ENTHUSIASTS

WHAT WOULD ENCOURAGE YOU TO DO MORE MOBILE SHOPPING?



IN THE PAST 12 MONTHS...



Another way enthusiasts shop differently from other customers is in their use of mobile. Enthusiasts are more likely to comparison shop on their phones while they're in a retail store and they care more about the experience of shopping via mobile.

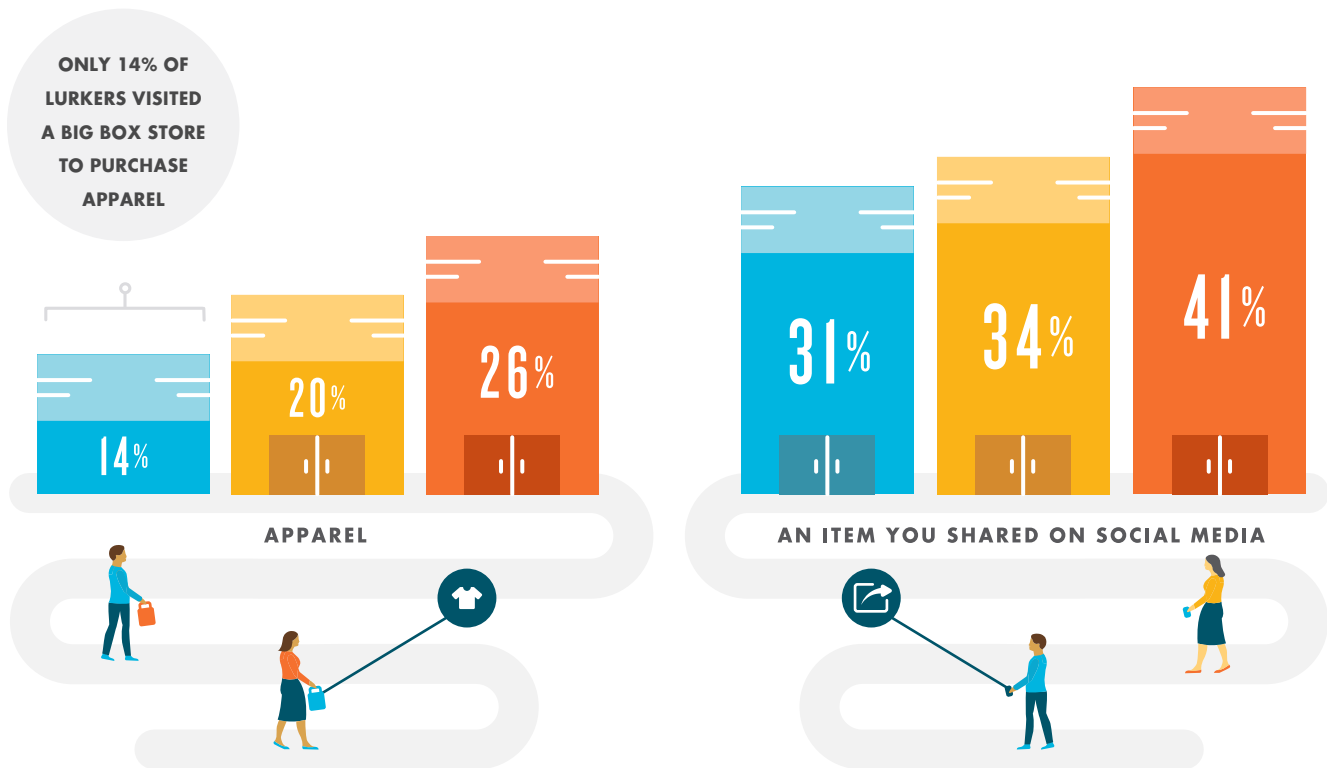
Enthusiasts also differ from other customers in how they shop offline. Enthusiasts are more likely to make both social media-inspired purchases and apparel purchases in big box stores. That means you need to be cautious about looking at social media updates for clues about which kinds of customers shop where.

FROM INSIGHT TO ACTION

Don't let social drive over-investment in mobile. Your social dashboard may show people clamoring for fancy new apps, but the larger part of your social media audience may care more about the desktop shopping experience.

BIG BOX SHOPPING

In the last 12 months, have you visited a big box store to purchase...



Social media analytics are crucial to the work of identifying recurring customer service issues. But providing great customer service isn't just about promptly replying to your customers' online complaints. You must also contextualize the feedback you get from social so that you provide your customers with the products and services they want in a way that fits with how they live and shop. That's why businesses need to look beyond social media analytics if they really want to know how to serve their customers.

FROM INSIGHT TO ACTION

Lurkers may shop less, but they still buy—and there are many more of them. So make sure your social messages and promotions offer something for the reluctant shopper, like tips on the recommended buy in a given product category.



EMILY MADE HER LATEST SOCIAL-INSPIRED PURCHASE AT WALMART

HOW TO MARKET AND SELL TO YOUR CUSTOMERS

When you make marketing or advertising decisions, you need to complement what you learn from social media analytics with other sources of customer intelligence. You can't use social media analytics to predict what social media users watch, where they will encounter your ads, or what kind of content they want to see from you because enthusiasts watch different TV shows and follow different topics on social.

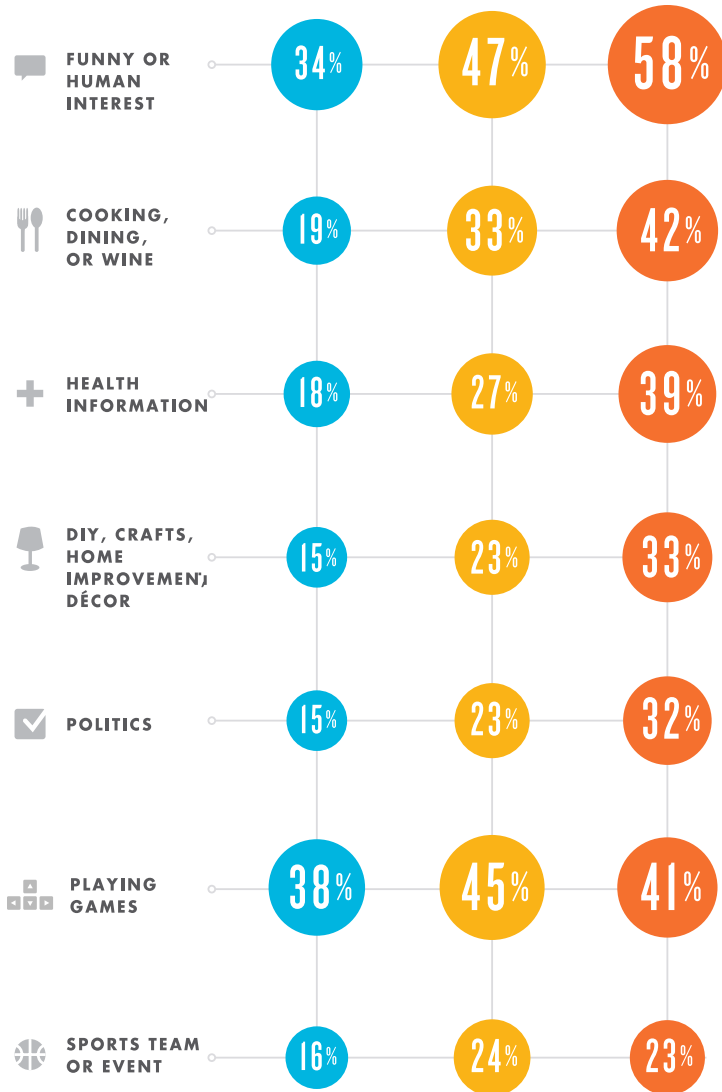
Of course, what really matters is what interests your customers. In particular, what they want to see in your social media presence. Once you recognize that social media analytics can't provide an accurate picture of what interests your entire social media audience, you can seek out additional sources of insight that will help you address your blind spots.

Nowhere is that more important than on social media itself. If you use updates, tweets and shares to shape the content on your social channels, you are likely to overestimate the potential of some topics and underestimate the importance of others. While just about every topic or area of activity earns more attention from enthusiasts than from lurkers, that divergence is particularly dramatic in categories like science, crafts, cooking and health. Once you look beyond enthusiasts, it's clear that funny/human interest content and online games are the two Facebook activities that are most likely to earn the attention of the social media audience as a whole.

**ONLY 18%
OF LURKERS
FOLLOW HEALTH
INFORMATION ON
SOCIAL MEDIA**

TOPICS FOLLOWED ON FACEBOOK

What topics or activities do you follow using Facebook?

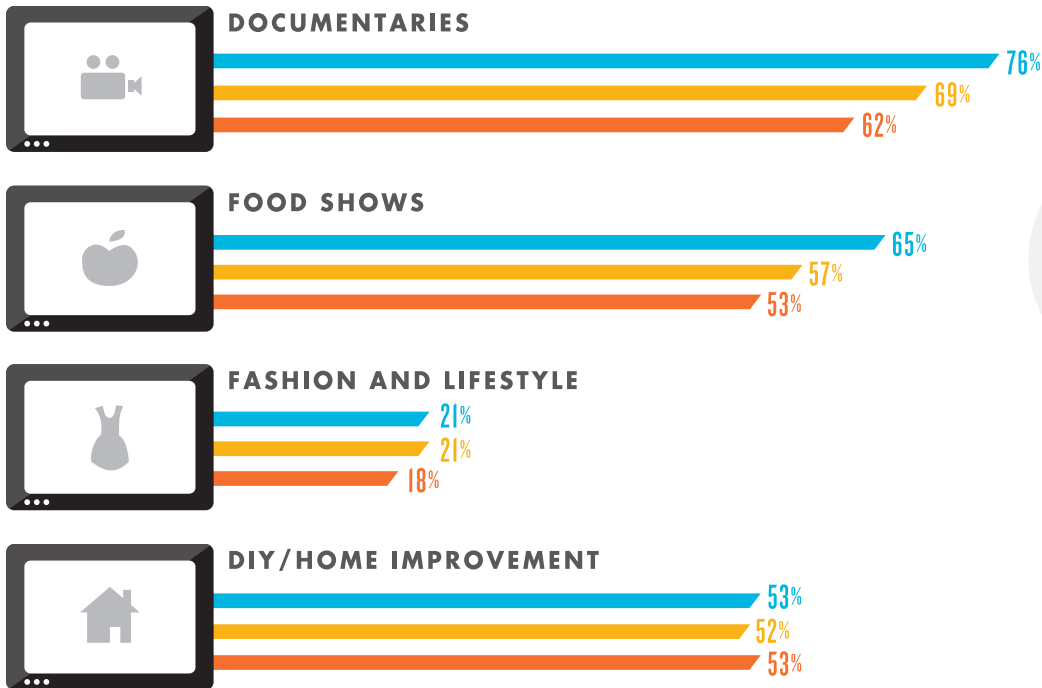


DONNA ENJOYS FINDING NEW GAMES ON SOCIAL MEDIA

EMILY USES SOCIAL MEDIA TO PLAY GAMES AND WATCH FUNNY KITTEN VIDEOS

PREFERRED TV PROGRAMS

What types of TV shows do you typically like to watch?



**65% OF
LURKERS LIKE
WATCHING
FOOD SHOWS**

These discrepancies aren't limited to social media alone. Lurkers and enthusiasts like different kinds of TV shows, as the major broadcasting company found when it asked its community members about the types of programs they typically watch. These differences are crucial when developing an advertising strategy that reaches different audience segments with complementary ad buys, or developing transmedia or second-screen projects aimed at driving customers from TV to social or vice versa.

The differences between enthusiasts, dabblers and lurkers don't follow a predictable pattern. While lurkers are more likely to watch almost every type of TV show, there are some categories in which their differences are not significant. The types of programs that enthusiasts are just as likely to watch are programs that relate to characteristic interests of enthusiasts, like fashion and DIY.

We can't always predict where enthusiasts and lurkers align or where they diverge so we need to look beyond social media analytics to understand overall customer or audience preferences. Understanding the differences among social media users is crucial to targeting your advertising and content so that they reach and resonate with as many customers as possible.

FROM INSIGHT TO ACTION

Align your social media and broadcast advertising strategies so that social messages targeted at enthusiasts will be complemented by broadcast ads targeting lurkers by focusing on the shows they watch most.

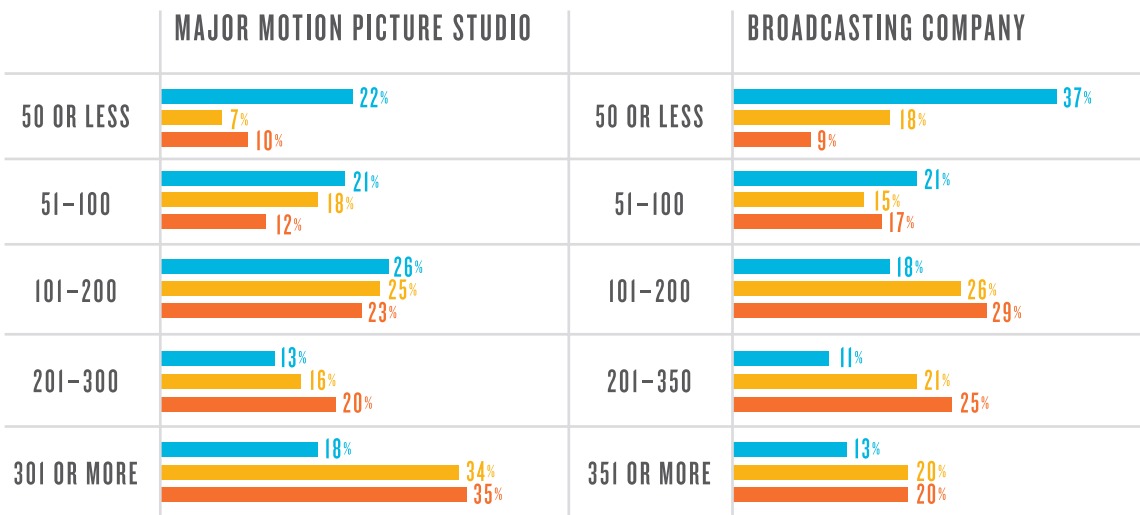
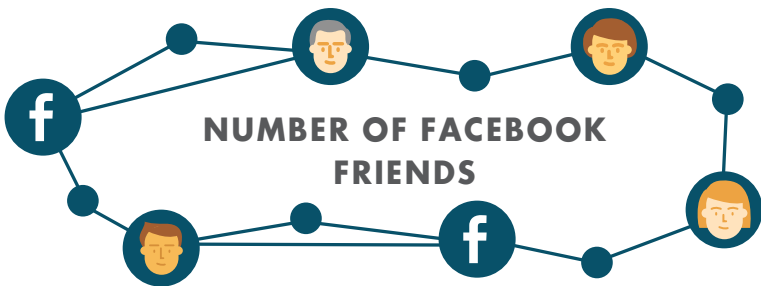
HOW TO ENGAGE YOUR CUSTOMERS

If there is any terrain your company should be able to navigate based on social media analytics, it's social media. To be effective in leveraging social media influencers, you need to understand the differences in how enthusiasts, dabblers and lurkers engage. In fact, the very notion of influence turns out to be less relevant to quieter social media users who are somewhat more independent and less interested in influencing, or being influenced by, their friends and family.

With that in mind, consider that a powerful part of social media is the ability to engage influencers so that they amplify your content and message. Social media analytics are essential when developing an influencer strategy. Online influencers are, by definition, drawn from the highly active social media users that analytics measure effectively. Influencer marketing can be effective because active social media users share more often and their content is seen by more people (in part because they have more Facebook friends).

NUMBER OF FACEBOOK FRIENDS

Approximately how many Facebook friends do you have?



As leading brands look for ways to elevate their social media and influencer marketing, the limitations of social media analytics become apparent.

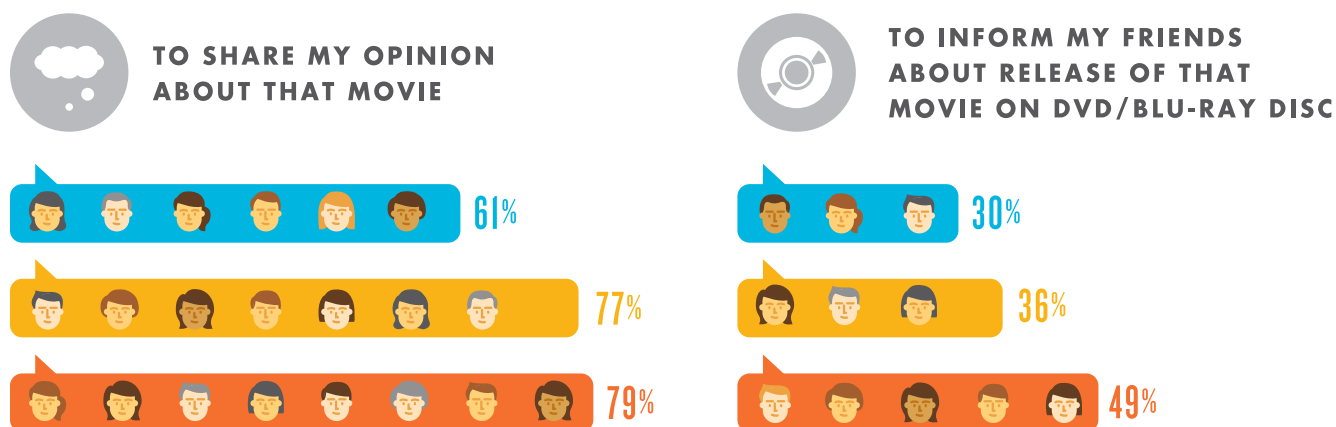
Analytics can tell you what influencers share and post, but they can't tell you whether those posts and shares resonate with the quieter users that influencers help you reach. Even click tracking will only get you so far, particularly if you're trying to track content that has been shared by your users, rather than viewed on your own Facebook wall or Twitter feed.

The continued success of influencer marketing depends on getting a more holistic picture of your social media audience—one that includes not only the influencers but also the prospective influencees. Recognizing the differences in how enthusiasts and lurkers shop, or what kind of topics and programs they follow, gives you part of that picture.

When it comes to sharing movie-related content for example, dabblers and enthusiasts are much more likely to have shared an opinion or recommended a movie—in other words, more likely to have tried to influence their friends.

REASONS FOR SHARING MOVIE INFORMATION

What are the reasons you have shared information about a specific movie with others on social media networks?



61% OF LURKERS WHO HAVE POSTED MOVIE-RELATED CONTENT HAVE USED SOCIAL MEDIA TO RECOMMEND A MOVIE TO THEIR FRIENDS

FROM INSIGHT TO ACTION

Along with “tell your friends” campaigns that appeal to influence-oriented enthusiasts, prompt dabblers and lurkers to share with a call to action that emphasizes sharing information rather than opinions.



LARRY HAS USED SOCIAL MEDIA TO RECOMMEND A MOVIE TO HIS FRIENDS

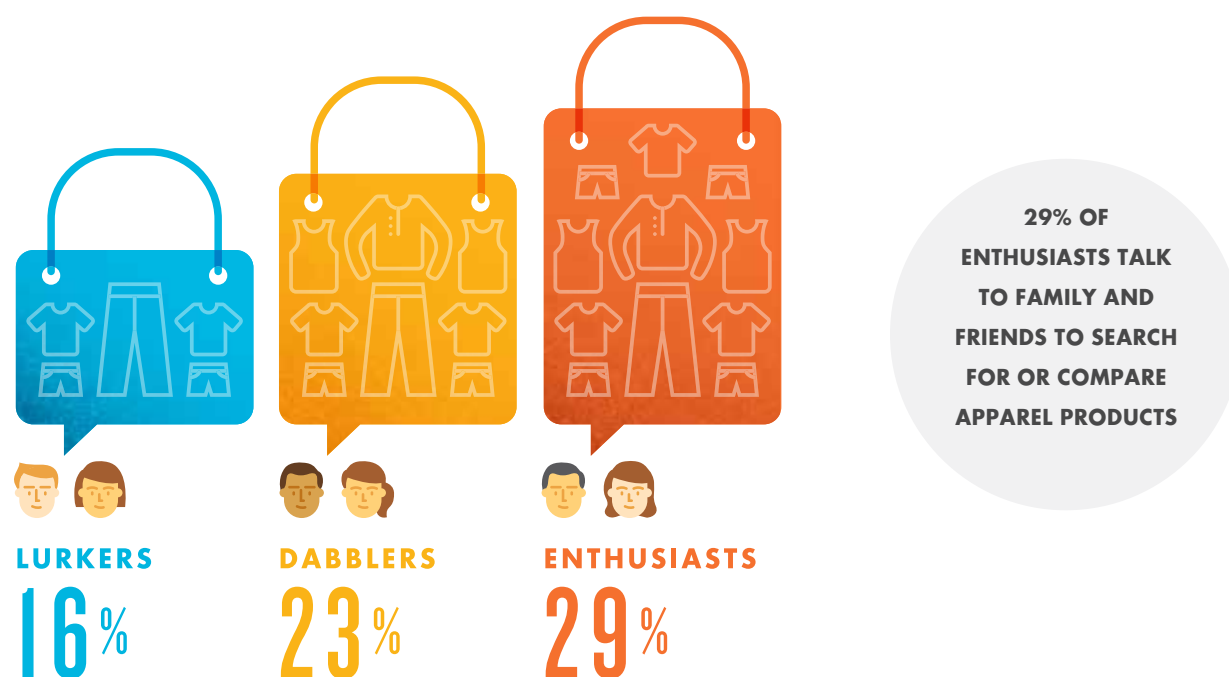
DONNA HAS USED SOCIAL MEDIA TO SHARE OPINIONS AND RECOMMEND MOVIES

If lurkers are less interested in influencing their friends, they are also less dependent on their friends' opinion and input. For example, lurkers are less likely to discuss prospective apparel purchases with their family and friends.

It's not surprising that enthusiasts and dabblers are more concerned with their friends' opinions and more interested in sharing their own views with their friends. The social engagement of enthusiasts is what drives their intense use of social media and their frequent updates. But it does pose a challenge for social media teams that rely on social media analytics to guide their online engagement strategies. By relying on social analytics, social media teams are likely to overestimate the importance of social motivations in driving their social media audience as a whole.

SOCIAL INFLUENCE ON APPAREL SHOPPING

In the past 12 months, have you talked to family and friends to search for or compare apparel products?



The solution is to broaden your picture of social media users and to think about ways to engage the very large portion of your audience that is relatively uninterested in influencing, or being influenced by, friends and family. That doesn't mean discarding influencer strategies: on the contrary, influencer engagement can be even more powerful once your influencers are spreading calls to action that appeal to lurkers and dabblers too.



LARRY DOESN'T DISCUSS APPAREL PURCHASES WITH HIS FAMILY AND FRIENDS

HOW TO BECOME A MORE CUSTOMER-CENTRIC COMPANY

Business leaders have never been more committed to putting customers in the driver's seat. According to a 2013 IBM study on the Customer-Activated Enterprise, 90% of CEOs expect to include customers in defining new products and services within the next 3-5 years; 72% plan to include customers in developing customer policies and 60% expect to include customers in developing business strategy.

But a third of those CEOs worry that the rest of the C-suite is out of touch with customers. Far from addressing that issue, social media analytics may actually compound the problem because it's giving companies a distorted picture of their social media audience and their customers.

**YOU'RE NOT FLYING
BLIND, BUT YOU ARE
NAVIGATING WITH
ONLY A VERY PARTIAL
VIEW OF WHO YOUR
CUSTOMERS ARE.**

This report explores several ways in which the shopping, media and social habits of enthusiasts diverge from the far larger number of dabblers and lurkers. **The differences between active and quiet social media users mean that social media analytics can mislead companies about what matters to their customers as a whole—or even what matters to their social media audience in particular.**

You're not flying blind, but you are navigating with only a very partial view of who your customers are, what they care about and what they want to see from your social media presence. Those gaps keep your businesses from using social media to become the customer-centric companies that social media

users demand. While social media analytics can help you understand customers who are social media enthusiasts, they don't provide you with the broad picture of social media users you need to reveal the insight that you need to market to, serve, or engage your customers as a whole.

To understand quiet customers and your social media audience, you need to contextualize what you hear on social in order to validate or re-assess your social media analytics. Transactional, loyalty or click-tracking data can all complement the data you gather from social media, but they don't tell you why your customers do what they do, or buy what they buy. But when you talk to your customers directly—as we did, by combining customer feedback with social media data those customers deliberately shared—you can get the context you need to serve, engage and market to your customers.

It's only when companies tap into these more advanced forms of social media insight that they'll achieve the true potential of social media. That potential lies in creating companies that are smarter than ever. Companies that are truly customer-centric.

**TAKE THE FIRST STEP TO BECOMING A MORE
CUSTOMER-CENTRIC COMPANY**

WATCH OUR PRODUCT TOUR

www.visioncritical.com/customer-intelligence-platform

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SPECIAL THANKS

This report has been a team effort, drawing on input from experts in the collaborative economy, professional design assistance and research and creative support from the Vision Critical team.

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This report does not necessarily reflect the views or opinions of the industry experts who provided valuable insight.

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ABOUT VISION CRITICAL

Vision Critical provides a cloud-based customer intelligence platform that allows companies to build engaged, secure communities of customers they can use continuously, across the enterprise, for ongoing, real-time feedback and insight. Designed for today's always-on, social and mobile savvy customer, Vision Critical's technology helps large, customer-centric enterprises discover what their customers want so they can deliver what they need. Unlike traditional customer research, which is slow, expensive and gathers dust on a shelf, Vision Critical's customer intelligence platform replaces static data and cumbersome reports with real-time actionable customer intelligence that companies need to build better products, deliver better services and achieve better business outcomes.

METHODOLOGY

This report is based on customer feedback from three Vision Critical Insight Communities owned by a broadcasting company (n=840), a movie studio (n=960) and an apparel brand (n=840), as well as on Voice of Market data. These communities were recruited to represent the voice of the customer for these companies. Community members were asked to engage with the three brands on the topic because of their interest in the subject matter.

The Voice of Market data is drawn from online surveys on Vision Critical's Market Panels in the USA (Springboard USA) and Canada (Angus Reid Forum). The results for the demographics of lurkers, dabblers and enthusiasts (n=16,500) are representative of the adult (18+) population of the US and Canada. The results were weighted by age, gender, region and income. This report also uses other data points from Voice of Market to describe shopping segments (n=23,900) and social-inspired shopping (n=3,200) among social media users.

Social media posting frequency (used to segment lurkers, dabblers and enthusiasts) and friend counts were in most cases based on data imported directly from the Facebook profiles of community members. These community members explicitly agreed to share their Facebook profile data by connecting to Facebook from within each insight community.