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# ARF Social Council Webinar: The Impact of COVID on Social Advertising

July 22, 2020



**Danti Chen**

*Head of Data Science & Product  
Global Intelligence  
Weber Shandwick*



**Kai Tu**

*Sr. Director of Product,  
Advanced Marketing Solutions  
ViacomCBS*



**Shelly Murphy**

*VP Media COE  
IRI*



**Meghan Cahill**

*VP of Client Success  
ListenFirst*

# Upcoming Webcast Snapshot

For more information about ARF's events visit, [www.thearf.org](http://www.thearf.org)

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SHOPPERxSCIENCE

## **Consumer Behavior & Brand Loyalty**

July 27-28

*Learn how to create successful content/messaging that resonates with consumers in the current climate.*

Presented by: **IRI, Snap, System1**

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July 29

*Precision Marketing for Precision Medicine*

Presented by: **Swoop, Twitter,  
Weber Shandwick & W2O**

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# Presented by ARF's Social Council

## Members:

Andrew Reid – Weber Shandwick (Chair)

Amy Laine – IBM (Co-Chair)

Shelly Murphy – IRI

Danti Chen – Weber Shandwick

Kevin Dang – BuzzFeed

Jonathan Farb – Listen First Media

Sara Grimaldi – Fullscreen Media

Danny Landau – Nielsen Social

Kevin Quinley – US Census Bureau

Jorie McLeod – Horizon Media (Young Pro Officer)

Agustina Perez Blua – Nielsen (Young Pro Ambassador)

# Social Council Mission

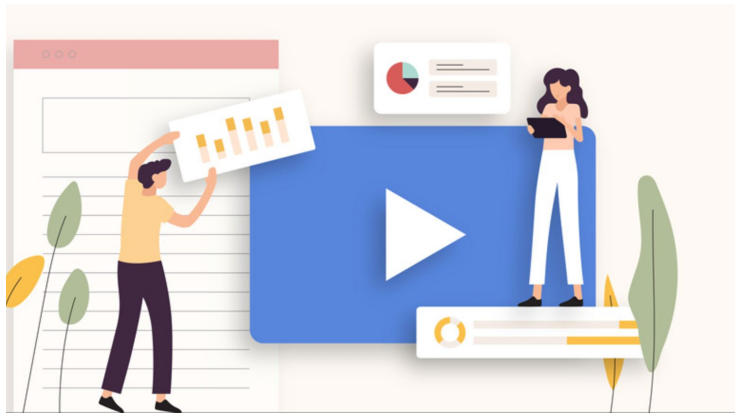
Mission statement:

“Assess best practices in the measurement of natural language processing, sentiment analysis, social marketing, and social media influencers and their effects in driving both upper and lower funnel brand metrics.”

This webcast is the third in a series produced by this Council. Coming up:

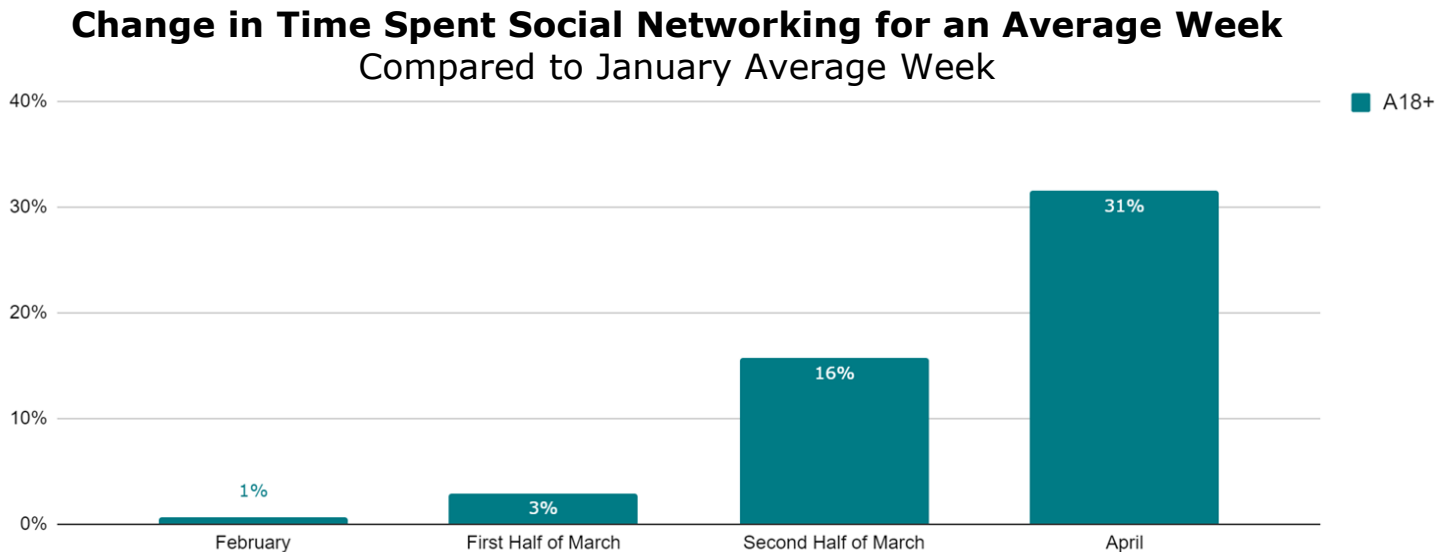
- Workshop on *Social Media Measurement* at ARF **AUDIENCExSCIENCE**, morning of September 22
- **Social Media Measurement Field Guide**

# Webinar Topics



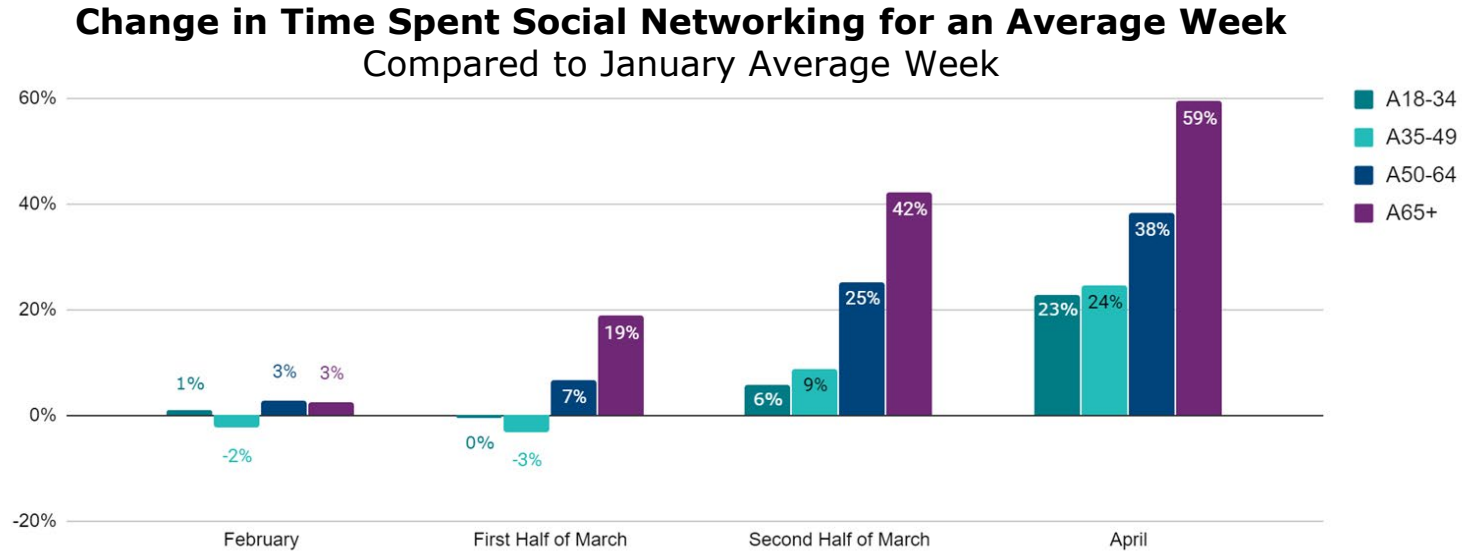
- Unique insights about each social media platform during the pandemic
- The explosion of creativity on social media and the expansion of what it means to be a “content creator”
- Adapting communication away from ‘go to the store’
- Offline sales measurement considerations

# People In Quarantine Dig Into Their Social Feeds



Time spent with social media on smartphones, tablets or computers increased substantially towards the end of March and into April

# Changes in Social Media Behavior Vary by Age

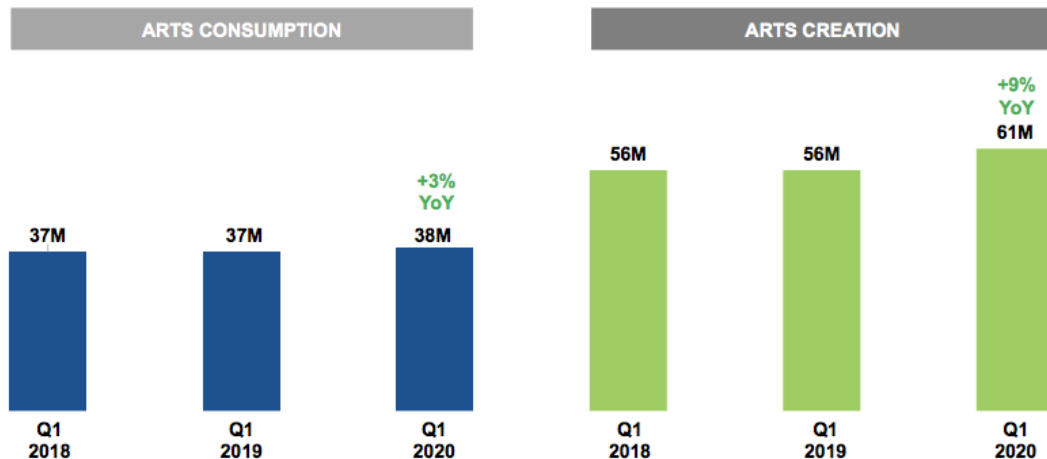


While all age ranges increased their time spent on social media, older people were earlier and more aggressive in changing their behavior

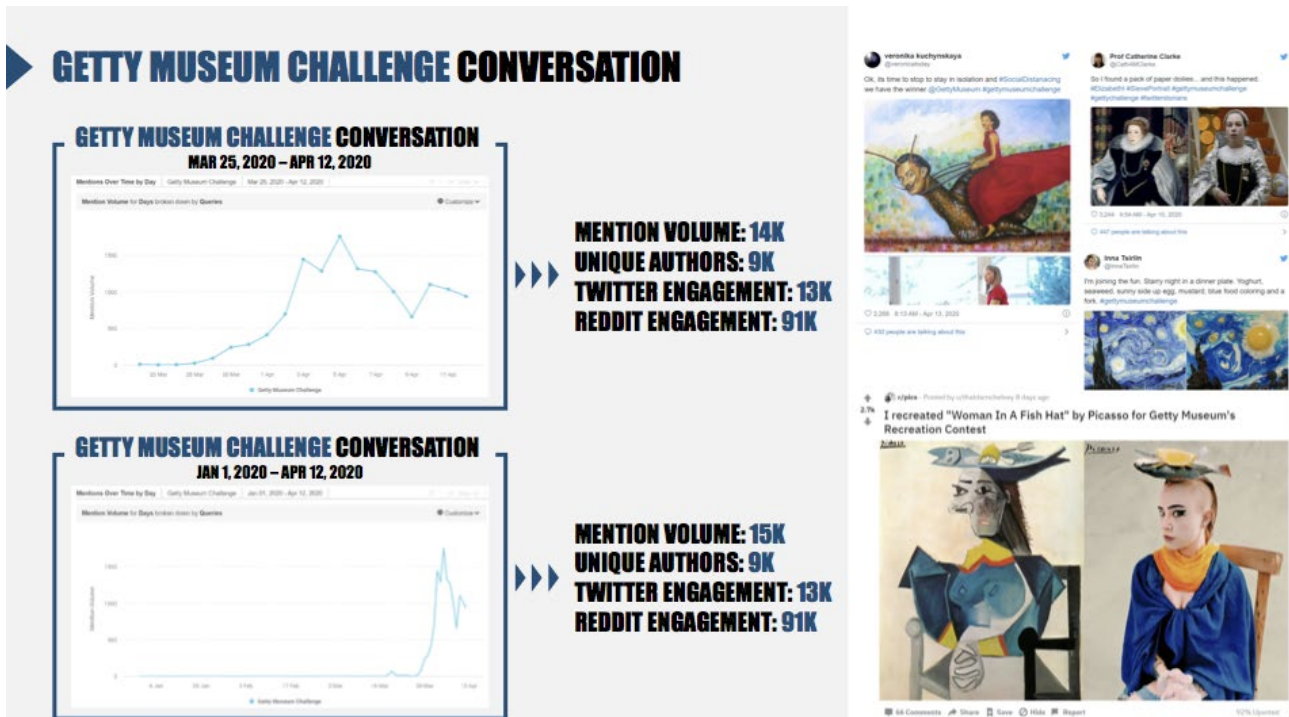


# How Are People Spending Time On Social Platforms?

## ► MENTION VOLUME: ARTS CONSUMPTION VS. CREATION



# Democratizing "Content Creation"

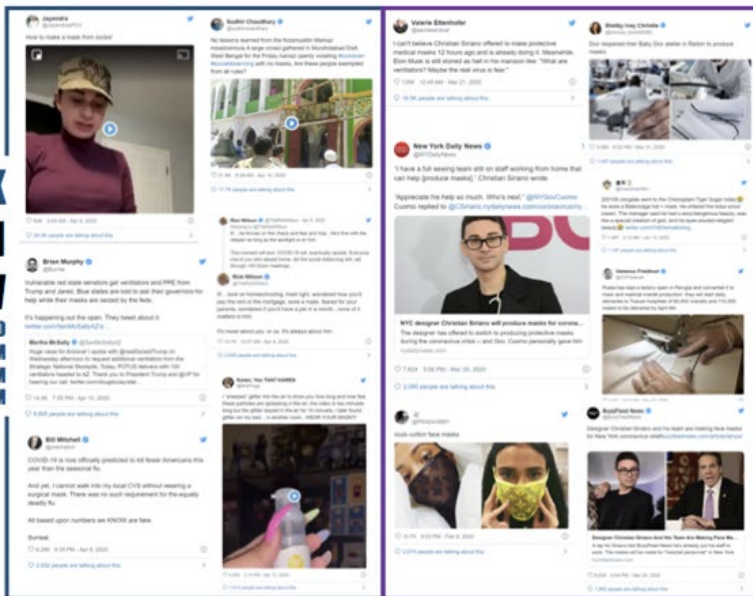


# the Creative Lense on Necessity

## FACE MASK AND FASHION CONVERSATION

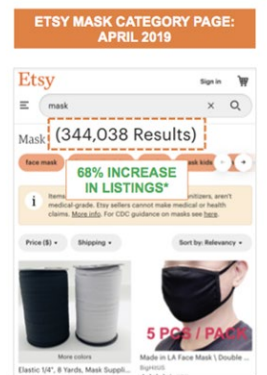
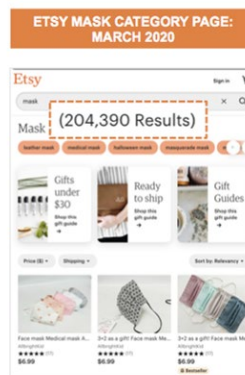
### FASK MASK CONVERSATION OVERVIEW

TIME RANGE: JAN. 20-APR. 20  
MENTION VOLUME: 33M  
UNIQUE AUTHORS: 17M  
TWITTER ENGAGEMENT: 23M

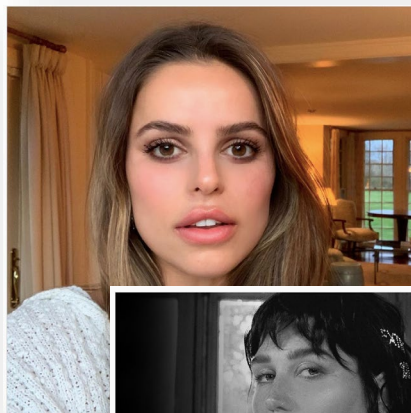


### FASK MASK + FASHION CONVERSATION OVERVIEW

TIME RANGE: JAN. 20-APR. 20  
MENTION VOLUME: 85K  
UNIQUE AUTHORS: 73K  
TWITTER ENGAGEMENT: 77K



# Finding Creative Formats To Go Virtual



clarinsusa • Follow  
Stay Home Stay Safe

clarinsusa @brooknader glowing after our @instagram LIVE makeup tutorial with @proartistkayla check out the tutorial on her page #makeup #clarinsmakeup cc: @women360mgmt #stayhome

Look breakdown:  
♥Face: SOS Primers in 01 under the eye and on the cheekbone, shade 00 in the high planes of the face, and Joli Rouge Blush (which is pH reactant for a personalized color)  
♥Lips: Lip Oil in \*NEW\* Candy Glam  
♥Eyes: Supra Mascara on lashes, Joli Rouge Blush, and eye shadows  
♥Ombre Satin in Purple Rain and Ombre Sparkle in Peach Girl



jackdaniels\_us • Follow

jackdaniels.us Tonight, pour yourself a glass and head over to @hiswhohis Instagram page for a special live show presented by Jack Daniel's. To help folks in the music industry who have been hit hard during these unusual times, just head to the @SweetReliefMusiciansFund using the link below. Cheers. bit.ly/JACKHELPS

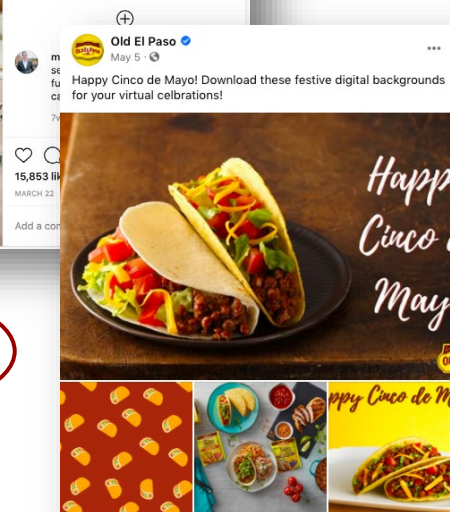
andrekorp  
5w Reply  
2,742 likes  
MAY 1  
Add a comment... Post

Virtual Concert



westelm • Follow

westelm Wish you were here? Now you can be — at least for your next Zoom meeting 🍷 Download our stylish video conference backgrounds now and start dialing in from your dream home. Link in bio! #workfromhome #westelmwhf



Conference Backgrounds

# Influencer Marketing: Everything Changed...

- Agencies and Publishers must be able to adapt to quick changes to content, flighting and distribution channels.
- Content creation has shifted more into the hands of the Influencer and away from Premium Production Content
- Content and Messaging have shifted to reflect current events and acknowledge the hardships across their customer base and away from direct sell tactics
  - More than ever authentic and relatable content is resonating with audiences as everyone navigates through life
  - Content in the form of a "Day in the Life" and DIY tutorials that relate the an audiences everyday dilemmas in an entertaining way are garnering the best engagement and sentiment





## ...And Then It Changed Again

- In addition to COVID, Social Justice and the Facebook Boycott have exacerbated the quick pivots made by Brands
- The combination of the factors above have shifted the priority measurement from Purchase Lift / ROAS to Brand Favorability and Social Sentiment
- Be prepared to shift back to the "New Normal" as companies re-evaluate their media spend after the dust settles



# Measurement of CPG Influencer Campaigns During COVID Requires Extra Consideration

- During 'typical' times, closed loop conversion to offline sales is a critical key performance indicator (KPI) for CPG advertisers

- Best practice includes calculating the incremental lift among markets exposed to a campaign relative to a look-a-like control



- A vs. B (test vs. control) should mirror each other in terms of historical consumer purchasing

# Consumer Behavior Shifts Introduce Volatility

Purchase Cycles  
Will Both Expand  
and Contract



**Pantry-stocking**,  
children home from  
school and more  
time at home

Long-Term  
Consumer  
Trends Reversing



Organic, natural and  
non-toxic products  
replaced by **stronger** /  
**cleaning products**

Consumers  
Returning to  
Comfort Brands  
and Categories



Brands  
like Kraft Mac &  
Cheese significant  
increase in **new**  
**buyers**

Increased Open  
Attitude,  
Willingness and  
Flexibility



Consumers  
more open to  
**switching**  
brands

Adoption of Self-  
Care



Increases in  
**exercise, diet**, and  
use of over-the-  
counter medications

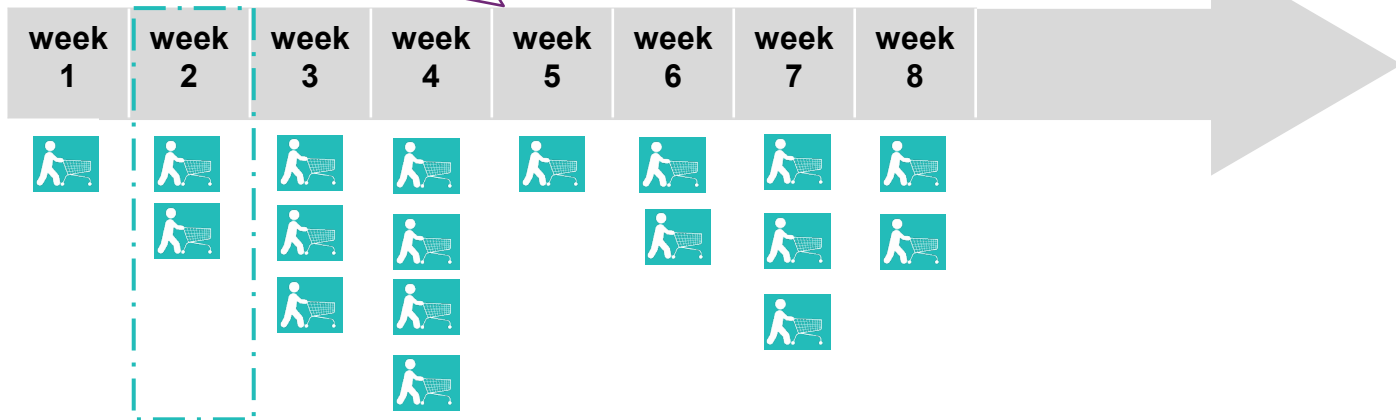


# In-flight Optimization can Supplement Influencer Offline Measurement

Weekly purchase file provides signal for campaign optimization

**Outcome:** Native creative has more buyers than video in week 2

**Action:** Reallocate impressions to native in following weeks



# Is Measurement Worth it During this Time?

- **Panic buying began March 9, 2020**

- Many campaign executions paused or cancelled impacting measurement
- Campaigns that continued require adjustments for out of stocks and panic buying behaviors
- Consider in-flight influencer campaign optimization

- **CPG purchasing begins to stabilize as of July 2020**

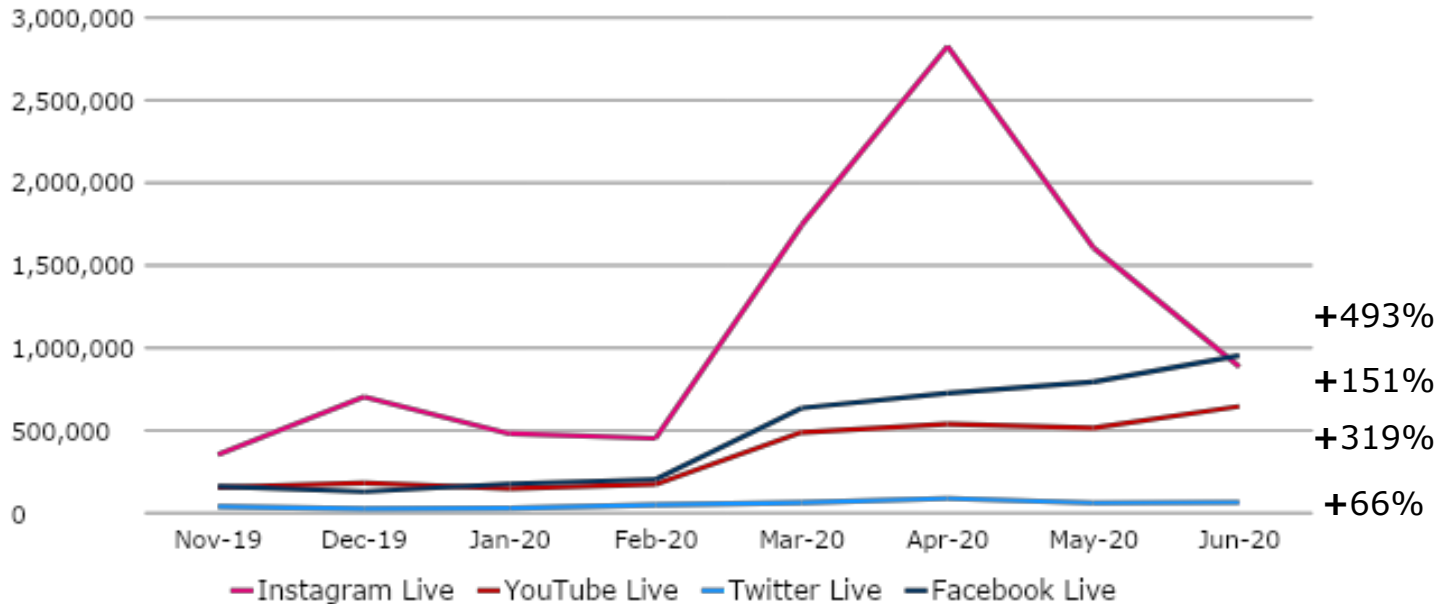
- For the week ending 7/12/20, Total CPG demand levels remained up 9% vs. YAG but declined from the prior week, matching the lowest Total CPG demand level since the week ending 4/19/20

## **Grow and defend**

- Churn is the new growth as brand loyalty takes a back seat
- Ensure influencer campaign execution takes advantage of new buyer (grow) and historical loyal buyers (defend) targeting

# Audiences May Not Be Ready To Go Out Just Yet; Engage Them With Live Video

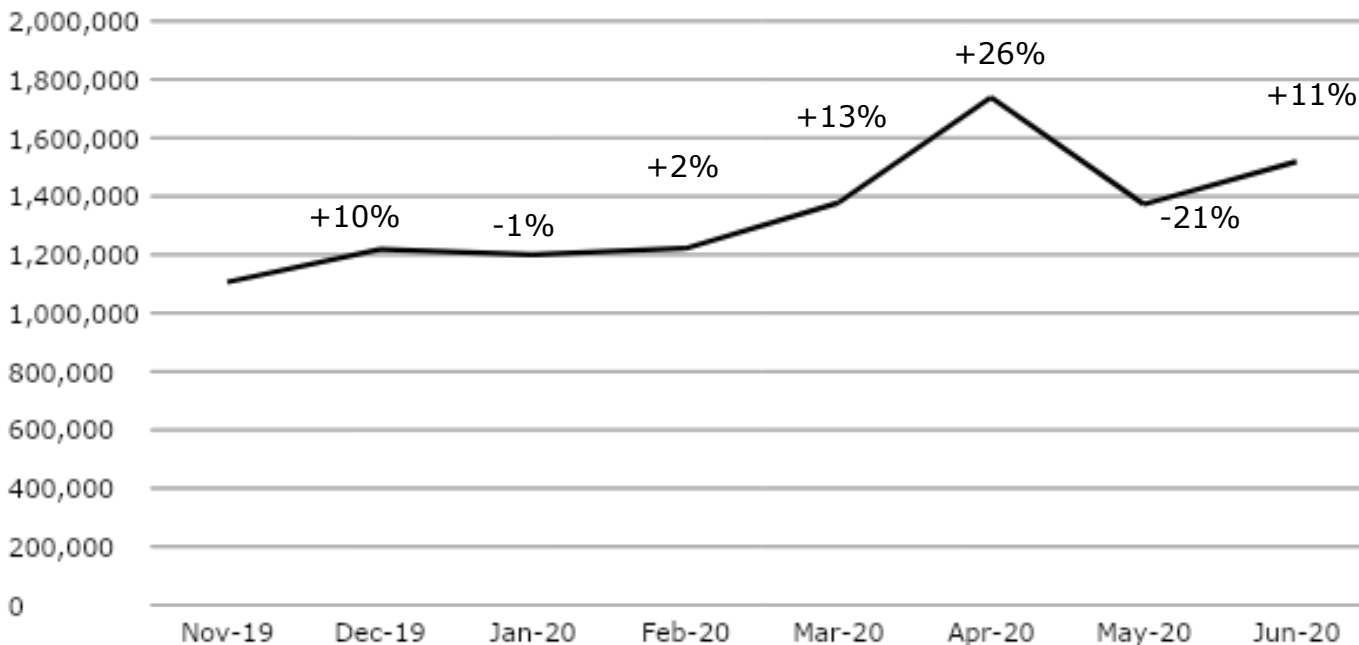
Mentions by Live Offering by Platform | Nov 2019 - Jun 2020



Source: ListenFirst Social Listening, Comparison of mentions on Twitter for each live offering

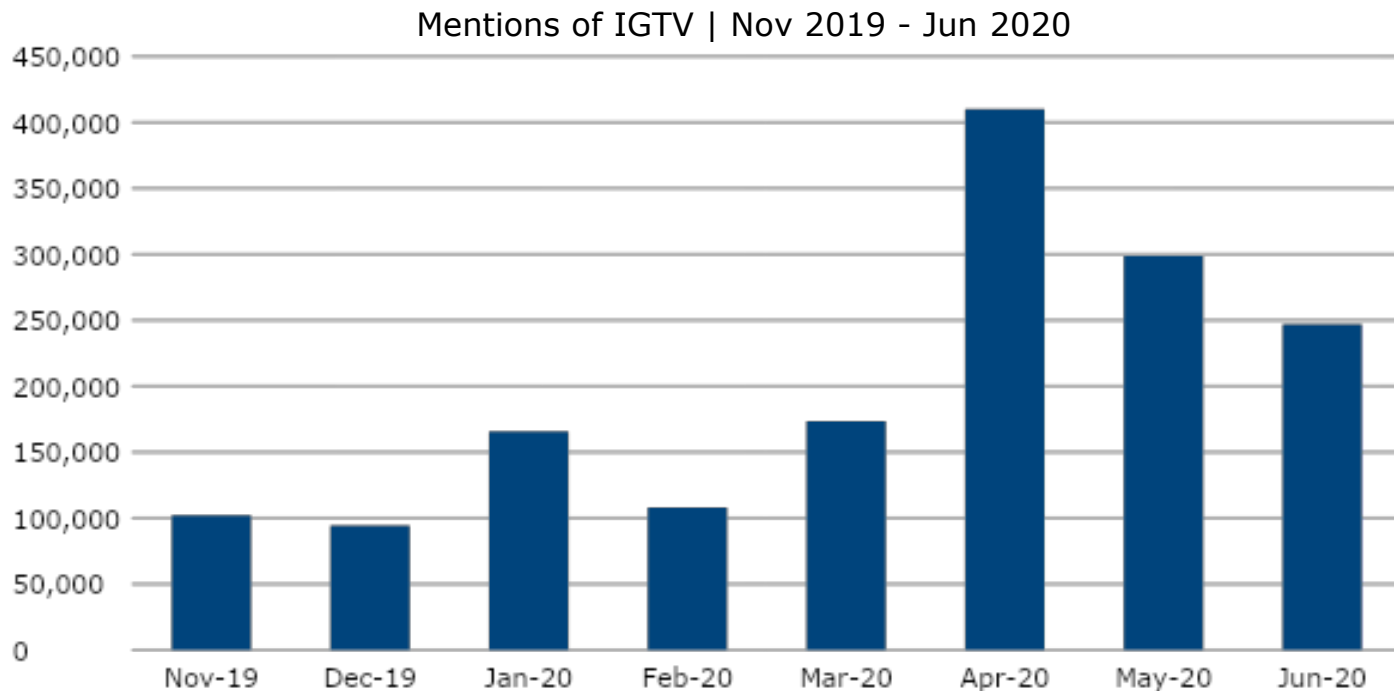
# Social a Medium For Self-Improvement; Mentions Of Tutorials Keep Climbing

Mentions of Tutorials | Nov 2019 - Jun 2020



Source: ListenFirst Social Listening, Mentions of "Tutorial"

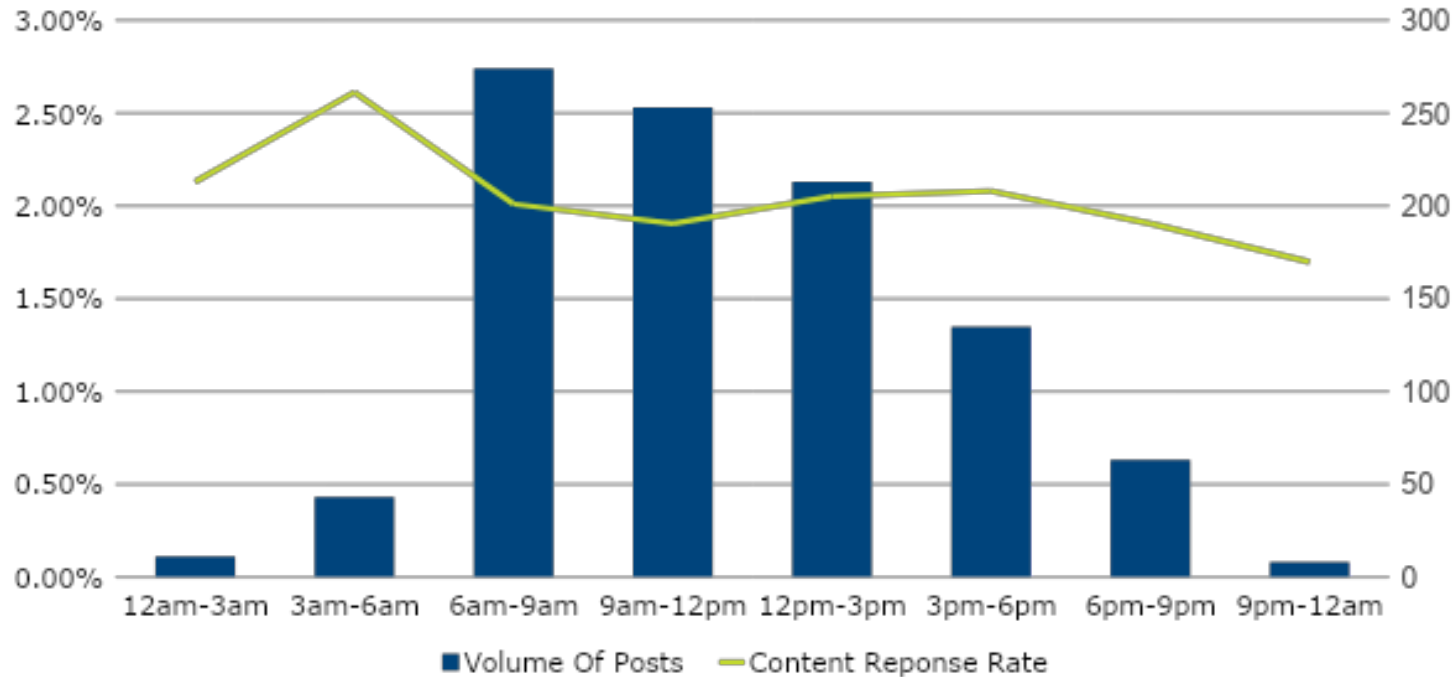
# Instagram Live is Fueling IGTV; Post On IGTV for Future Viewing



Source: ListenFirst Social Listening, Mentions of "IGTV" OR "Instagram TV" on Twitter

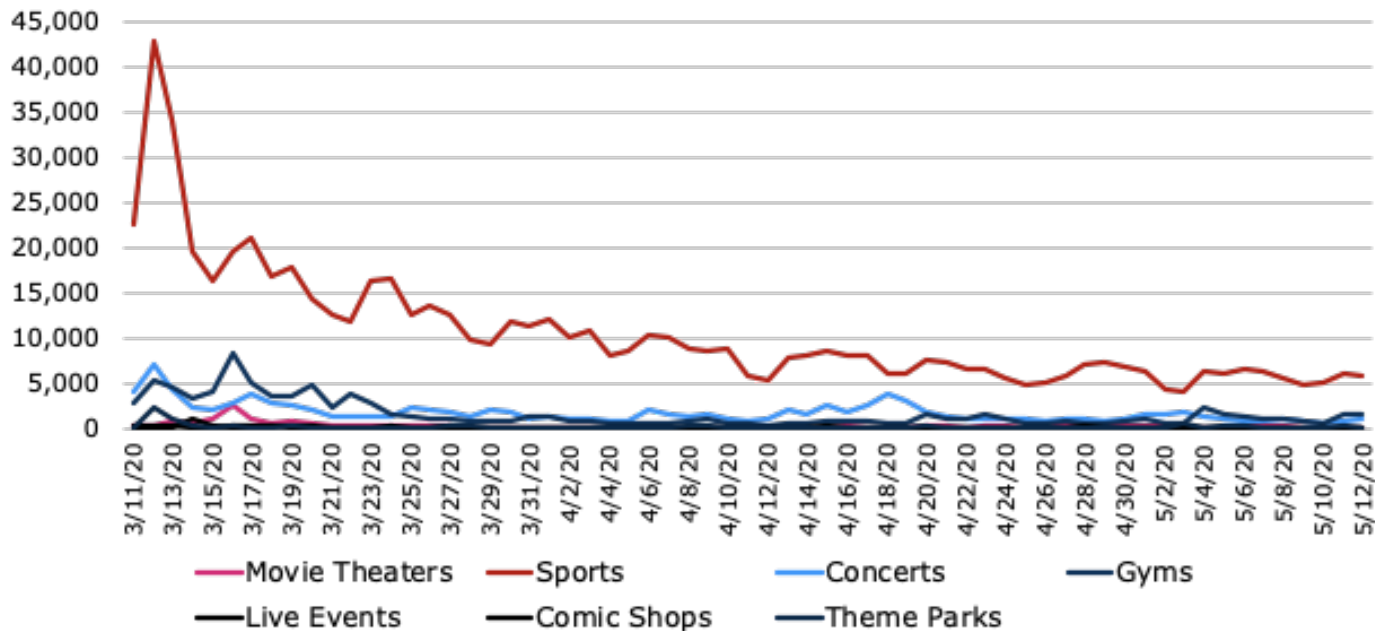
# Best Time To Post On Instagram

Time of Posts vs Content Response Rate on Instagram



# Entertainment Types Consumers Talk About Most; Live Sports Dominated

Mentions of Entertainment Types | Mar 11 - May 12, 2020



Source: ListenFirst Social Listening

# How Do Consumers Feel About These Events?

## Sentiment & Emotional Analysis | Entertainment Types | Mar 11 - May 12, 2020

Entertainment	Negative	Positive	Fear	Sadness	Anger	Surprise
Theme Parks	33%	14%	25%	2%	5%	5%
Gyms	33%	25%	18%	7%	4%	4%
Movie Theatres	28%	15%	19%	3%	4%	4%
Sports	22%	19%	12%	2%	4%	4%
Concerts	19%	55%	7%	8%	2%	2%
Live Events	15%	28%	11%	1%	3%	3%
Comic Shops	8%	10%	5%	3%	3%	3%

Fans have responded positively to the new norm of virtual concert experiences. Many see this as an opportunity to watch favorite artists perform live while supporting great causes.

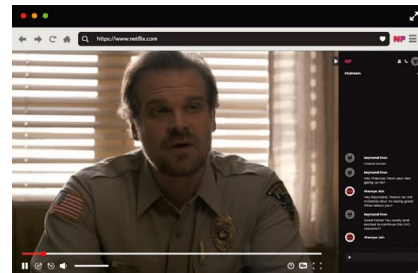


# Consumers Are Giving Co-Watching a Shot; New Partnership Opportunities

Unofficial plugins allow  
viewers to watch  
programs and films  
“together”



Example: [Netflix Party](#)



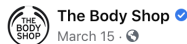
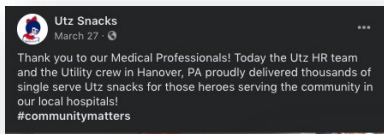
Musicians are leaning  
into live-streams as a  
replacement for live  
concerts



Example: [Travis Scott's Fortnite Concert](#)



# Supporting Communities



As communities around the world are struggling with COVID-19, we recognize that not everyone has access to supplies needed to protect themselves. The Body Shop has products that allow people to wash hands & eliminate bacteria – the most effective form of prevention based on World Health Organization Guidelines. In North America The Body Shop will be donating approx. 30,000 units of product to communities in need of support. A small gesture to keep our communities safe. Let's ... [See More](#)

To Our North American Customers,

As communities around the world are struggling with Coronavirus (COVID-19), we recognize not everyone has access to the supplies that they need to protect themselves. At The Body Shop we have products that allow people to safely wash their hands to eliminate bacteria, which is the most effective form of prevention from COVID-19 based on World Health Organization guidelines.

Our stores all over North America partner with shelters and senior communities as part of their everyday work. To further support these communities, we are donating approximately 30,000 units of cleansing products to these organizations throughout the US and Canada. In addition, we have provided all North American employees with hand washing products to take home to protect themselves and their families.

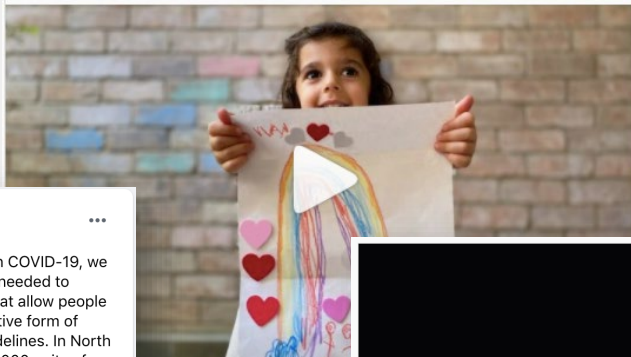
We are letting our customers know that while we will have hand washes, shower gels and bar soaps in stock in our stores, we might not have the full selection of scents at this time. Restock is on its way, so please be patient as we refill our shelves.

While we know this is a small gesture to keep our communities as safe as possible, we are open to hearing your ideas as well and should you want to get involved with the local organizations we work with please speak to your local store team. It is more important than ever that we take care of people and lend a helping hand. We appreciate your continued support.

Stay safe and well,  
The Body Shop North America Team

815

64 Comments 58 Shares



target • Follow



We'll never stop helping those who are helping all of us. ❤️ As a sponsor of @gblctzn's One World: #TogetherAtHome broadcast, we're making a donation to the United Nations Foundation's COVID-19 Solidarity Response Fund. This is part of our \$10 million pledge toward coronavirus relief efforts. Head to link in bio for more on how we're directing

drinkaware.co.uk  
for the facts

EVEN APART,  
WE STAND TOGETHER.

GUINNESS IS PLEDGING £1 MILLION  
TO SUPPORT BARTENDERS  
ACROSS GREAT BRITAIN.



GUINNESS



diageo • Follow



As the British drinks trade faces unprecedented challenges from the impact of COVID-19, we are proud to support the industry with a £1million from Guinness to support bartenders. We will also be supporting small businesses by lowering minimum order quantities, and offering complementary training and online learning available for anyone in the drinks trade. Visit Diageo.com to find out more.

Drink responsibly. DRINKIQ.com

11w



2,280 likes

MARCH 18

Add a comment...

Post

# Heading Outdoors

**tartecosmetics** • Follow

**tartecosmetics** • UPDATE: THANK YOU to everyone who submitted a nomination. We are so inspired by all of the nominations in our comments. Gift card recipients have been selected. We have started sending DMs to nominees & will reach out to all 250 of the nominees by Friday at midnight. Hug a hero (virtually!) 🍷 We are so grateful for the brave workers on the frontlines fighting COVID-19 & want to show a token of appreciation to YOUR heroes in honor of National Superhero Day on 4/28. All you have to do is nominate your hero by tagging them in the

**coorsbanquet** • Follow

**coorsbanquet** • The 1960's limited edition heritage can, back when only 11 states could get their hands on a Banquet...legally.

4w

7elebrity 🍷  
4w Reply

7elebrity 🍷  
4w Reply

**stonyfield** • Follow

**stonyfield** • SWEEPS! Enter for a chance to win a @biggreeneegg grill! The 🌞Summer at Home🌞 Sweepstakes runs June 29-July 1. For Official Rules and to enter, go to the link in our bio.

Love a good #backyard #cookout, #yogurt, and #sun? Don't miss out! Enter for a chance to win a MiniMax EGG #grill with Nest Package (valued at \$939). And stay tuned all week, as we're enlisting the help of BGE Team Green member @grillin\_with\_dad! Join us for yogurt recipes, tips, and ideas for fun in the sun, just in time for the Fourth of July! #stonyfield #organic

2d

637 likes  
2 DAYS AGO

Add a comment... Post

**kirklands** • Follow

**kirklands** • Social distancing doesn't mean you have to miss out on watching your favorite movies on the big screen! Here are our top tips for creating a magical movie experience at home.

- Get a projector and a screen (a white sheet works too!) 🍿
- Use lanterns or string lights to create the perfect lighting at night.
- Blankets, pillows, and puffs, oh my! You can never be too comfy during a movie night! 🍿
- Pop the popcorn and satisfy every sweet tooth with a candy station. 🍬
- What movie is your family watching this weekend!?

10,507 likes  
MARCH 27

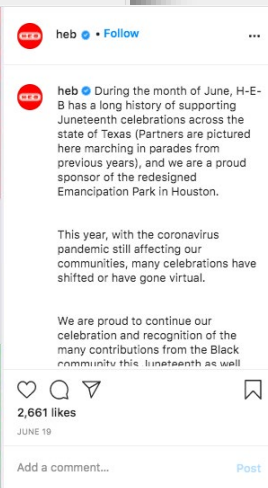
Add a comment... Post

# Tapping Into Audience Nostalgia

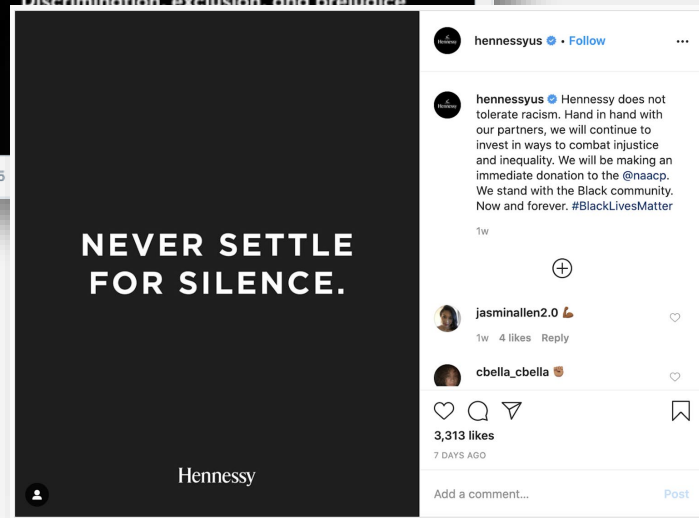
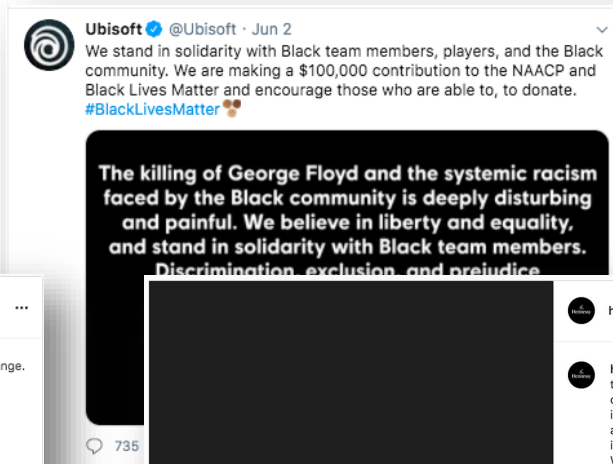
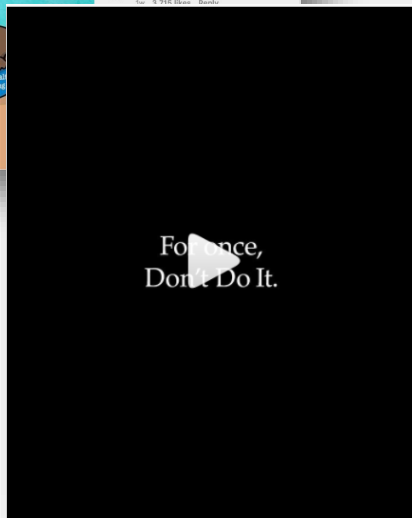




# Rallying Around Holidays



# Standing Up for Racial Equality



# Addressing #StopHateForProfit Boycott



Jameson U.S. @jameson\_us

At Jameson, hate speech doesn't have a seat at our table. As a brand that celebrates and brings people together, we must act. We have paused paid advertising across ALL social media channels for July to [#StopHateForProfit](#).



Patagonia @patagonia · Jun 21

Patagonia is proud to join the Stop Hate for Profit campaign. We will pull all ads on Facebook and Instagram, effective immediately, through at least the end of July, pending meaningful action from the social media giant.



REI @REI

For 82 years, we have put people over profits. We're pulling all Facebook/Instagram advertising for the month of July.

[#StopHateForProfit](#)



The North Face @thenorthface

We're in. We're Out [@Facebook](#) [#StopHateForProfit](#)

Learn more: [stophateforprofit.org](#)



NAACP @NAACP · Jun 18

"It is clear that Facebook and its CEO, Mark Zuckerberg, are no longer simply negligent, but in fact, complicit in the spread of misinformation, despite the irreversible damage to our democracy..." - @DerrickNAACP

apnews.com/126dffbb05b92c...

6:42 PM · Jun 19, 2020 · Twitter Web App

NAACP @NAACP · Jun 18

"It is clear that Facebook and its CEO, Mark Zuckerberg, are no longer simply negligent, but in fact, complicit in the spread of misinformation, despite the irreversible damage to our democracy..." - @DerrickNAACP

apnews.com/126dffbb05b92c...

10:26 AM · Jun 19, 2020 · Twitter Web App

← Tweet

Chobani @Chobani

Action over advertising. Today we join our friends at [@ADL](#) and a growing list of amazing groups like the [@NAACP](#) to pause all our paid social advertising. We've always stood against hate & bigotry and it is our duty to help change these platforms. [#StopHateForProfit](#)

Jonathan Greenblatt @JGreenblattADL · Jun 29

Excited to hear that @Chobani, under the leadership of my friend @hamdiulukaya, has joined the growing list of companies who are committing to [#StopHateForProfit](#) to take a stand against hate and bigotry. [StopHateForProfit.org](#)

3:02 PM · Jun 29, 2020 · Twitter Web App

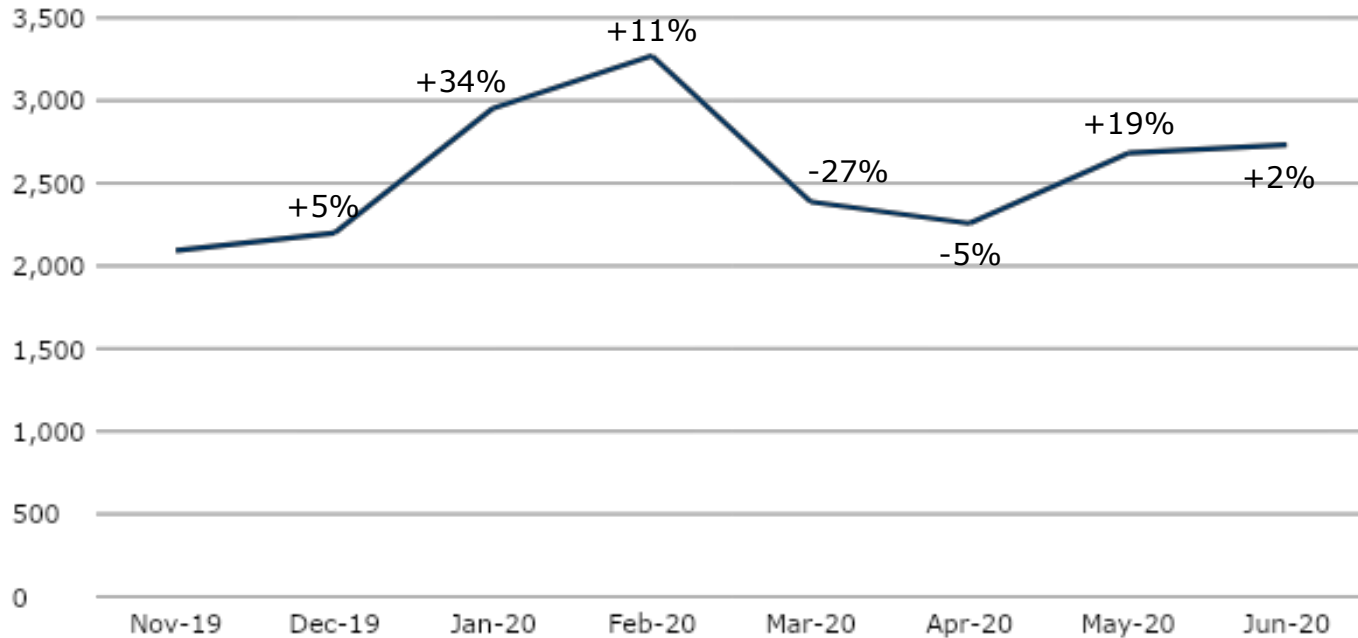
74 Retweets 331 Likes



5:17 PM · Jul 2, 2020 · Twitter Web App

# Despite Ad Boycotts, Facebook's Engagement Holds

Average Facebook Content Responses | Nov 2019 - Jun 2020

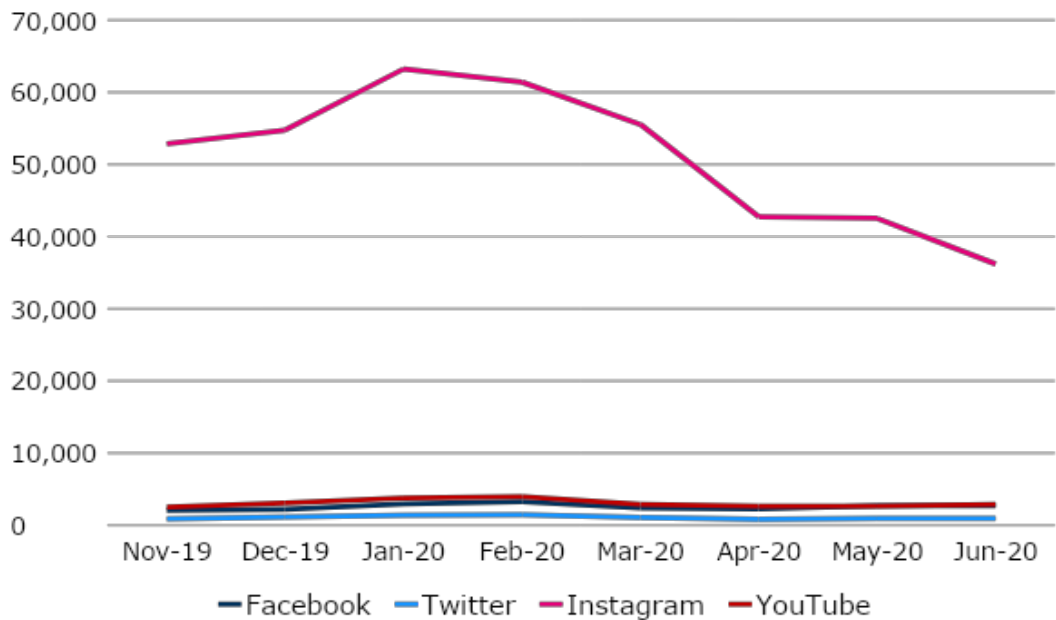


Source: ListenFirst, The average number of content responses (reactions, likes, shares, and comments) per post published by Top Advertisers



# Cross-Channel Engagement

Average Content Responses / Post By Platform | Nov 2019 - Jun 2020



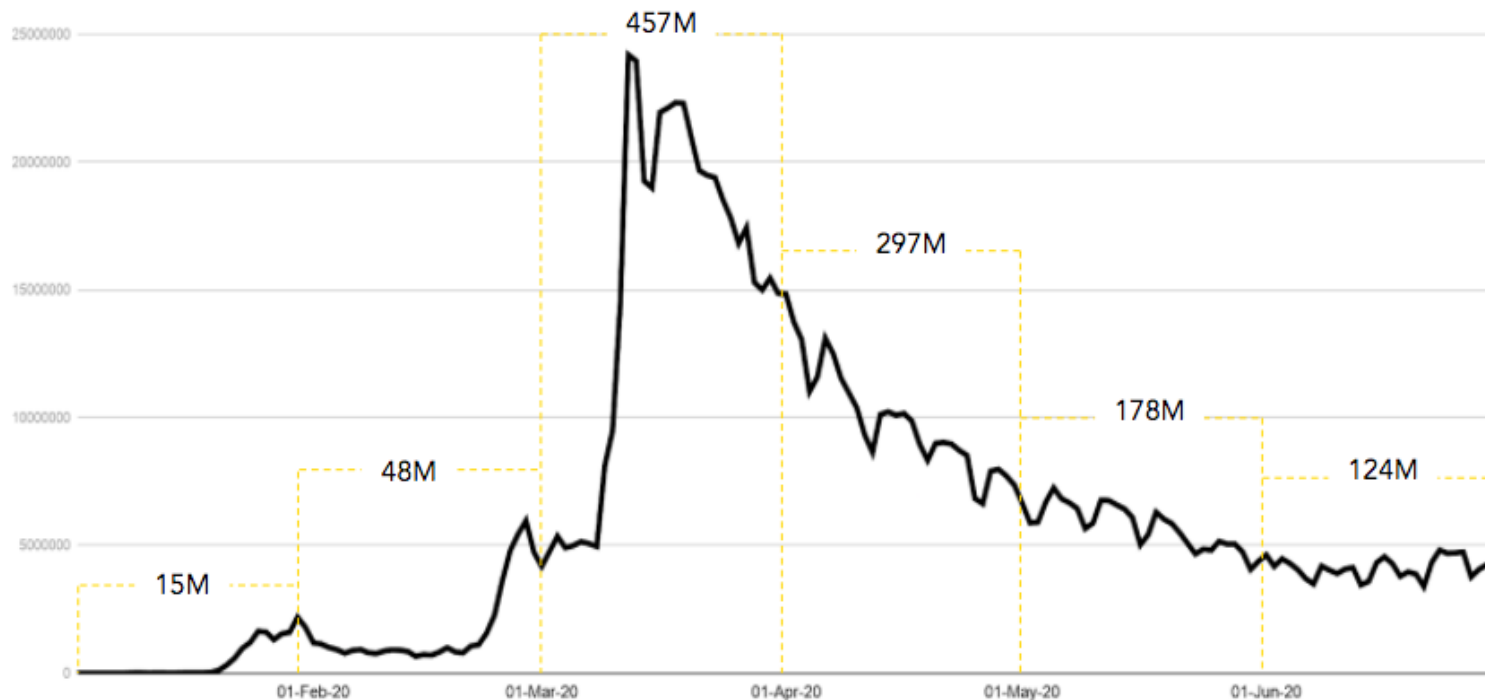
Despite recent declines, Instagram remain at the forefront for engagement, holding its lead before and during COVID.



With less ads to compete with in the marketplace, organic engagement is being closely monitored, with potential opportunity to see significant ROI.

# Conversation about Coronavirus Is Ticking Back Up

Coronavirus Mentions (Twitter & Reddit) Jan 01 – Jun 30, 2020



Source: ListenFirst Social Listening

# Three things to remember

- **Social Media in the spotlight**
  - Social has become even MORE important in light of COVID
  - Creativity in content creation will continue to be important for driving engagement
- **Direct implications of the Social Media explosion**
  - An expanded definition of content creation
  - Broaden the meaning of content creator & influencers
  - The increased scope & reach of social media
- **Yes, measurement is worth it**
  - Churn is the new growth as brand loyalty takes a back seat
  - Ensure influencer campaign execution takes advantage of new buyer (grow) and historical loyal buyers (defend) targeting