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

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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

July 27-28
Learn how to create successful content/messaging that resonates with consumers in the current climate.
Presented by: IRI, Snap, System1

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)
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

**Change in Time Spent Social Networking for an Average Week Compared to January Average Week**

- **February**: 1%
- **First Half of March**: 3%
- **Second Half of March**: 16%
- **April**: 31%

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

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

Source: Weber Shandwick Global Intelligence Social Report
Democratizing “Content Creation”

Source: Weber Shandwick Global Intelligence Social Report
the Creative Lense on Necessity

FACE MASK AND FASHION CONVERSATION

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

FASTMASK + FASHION CONVERSATION OVERVIEW
TIME RANGE: JAN. 20-APR. 20
MENTION VOLUME: 85K
UNIQUE AUTHORS: 78K
TWITTER ENGAGEMENT: 77K

Source: Weber Shandwick Global Intelligence Social Report
Finding Creative Formats To Go Virtual

Virtual Concert

Conference Backgrounds

Source: ListenFirst Social Listening
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.

Source: Information Resources Inc.
Increased Open Attitude, Willingness and Flexibility

Consumers Returning to Comfort Brands and Categories

Purchase Cycles Will Both Expand and Contract

Long-Term Consumer Trends Reversing

Adoption of Self-Care

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

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

Brands like Kraft Mac & Cheese significant increase in new buyers

Consumers more open to switching brands

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

Source: Information Resources Inc.
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

Source: Information Resources Inc.
Is Measurement Worth it During this Time?

• **Panic buying began March 9, 2020**
  o Many campaign executions paused or cancelled impacting measurement
  o Campaigns that continued require adjustments for out of stocks and panic buying behaviors
  o Consider in-flight influencer campaign campaign optimization

• **CPG purchasing begins to stabilize as of July 2020**
  o 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**
  o Churn is the new growth as brand loyalty takes a back seat
  o Ensure influencer campaign execution takes advantage of new buyer (grow) and historical loyal buyers (defend) targeting

Source: Information Resources Inc.
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

Mentions of IGTV | Nov 2019 - Jun 2020

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

Source: ListenFirst; Volume of posts by time; Rate of content responses by time, June 2020 | Instagram | Top 1,000 Posts from 485 Top Advertisers
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

<table>
<thead>
<tr>
<th>Entertainment</th>
<th>Negative</th>
<th>Positive</th>
<th>Fear</th>
<th>Sadness</th>
<th>Anger</th>
<th>Surprise</th>
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<tbody>
<tr>
<td>Theme Parks</td>
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<td>14%</td>
<td>25%</td>
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<td>Movie Theatres</td>
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<td>15%</td>
<td>19%</td>
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<td>Live Events</td>
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<td>28%</td>
<td>11%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
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<tr>
<td>Comic Shops</td>
<td>8%</td>
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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.

Source: ListenFirst Sentiment & Emotional Analysis
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

Guinness is pledging £1 Million to support bartenders across Great Britain.

Even apart, we stand together.

To Our North American Customers,

As communities around the world are struggling with COVID-19, we recognize how everyone has access to the supplies they need to keep themselves safe. The Body Shop has paused production that allow people to wash their hands to distribute hand sanitizers, as the most effective form of prevention from COVID-19, based on World Health Organization guidelines.

Our stores in our North American partners are closed, but our communities are part of their everyday work. To further support these communities, we are launching the partnership, DRINK42, to support communities during these times. Our mission is to make sure that bars, restaurants, and other community spaces are able to stay open during these trying times.

We are setting up a custom fund where all we will have hand sanitizer, sanitizer gels, and hand sanitizer in stock in our stores, so that we can keep the bars and restaurants open. Please donate to this effort and join our community.

In addition, we will have a range of North American employees with a 42 Fund in place to help support our employees to the best of our ability during these challenging times.

We are listening to our communities. Let us all learn from hand sanitizer, sanitizer gels, and hand sanitizer in stock in our stores, so that we can keep the bars and restaurants open. Please donate to this effort and join our community.

“While we have to take this small gesture to keep our communities as well as possible, we are open to hearing from others on how we can best support the health organizations working alongside us. Please reach out to your local community leaders.”

For more information on how to support your local communities, go to our Facebook page or visit our website.
Heading Outdoors

ohon.com

sontyfield

kirklands
Rallying Around Holidays

- **Rallying Around Holidays**: Image of a holiday-themed advertisement featuring various products and a family celebrating.

- **May the Fourth Brew with You**: Image of a beer advertisement with the text "May the Fourth Brew with You".

- **H-E-B Celebrates Juneteenth**: Image of an advertisement for H-E-B celebrating Juneteenth with text "We stand with the black community in the fight against intolerance, racism, discrimination and hate. Together, we have the power to create real change."
Standing Up for Racial Equality
Addressing #StopHateForProfit Boycott

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.

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

#StopHateForProfit

Learn more: stophateforprofit.org

We’re in. We’re Out @Facebook #StopHateForProfit

“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

Learn more: stophateforprofit.org

This is why @Chobani, @Patagonia, @AMD, and many others have pulled their advertising from Facebook until they take a stand against hate and bigotry. It’s time to hold Big Tech accountable for their actions.
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
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.

Source: ListenFirst, Average number of content responses (likes, comments, reactions, retweets, replies, shares) per post published by Top Advertisers
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**
  o Social has become even MORE important in light of COVID
  o Creativity in content creation will continue to be important for driving engagement

• **Direct implications of the Social Media explosion**
  o An expanded definition of content creation
  o Broaden the meaning of content creator & influencers
  o The increased scope & reach of social media

• **Yes, measurement is worth it**
  o Churn is the new growth as brand loyalty takes a back seat
  o Ensure influencer campaign execution takes advantage of new buyer (grow) and historical loyal buyers (defend) targeting