



Cracking the Code of Social Media Measurement

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Stage Setting: Social Networking is a Global Phenomenon

If Facebook was a country it would be the third largest in the world after China and India

Social Networking Continues to Capture and Engage Audiences on a Global Basis

- More than **770 million people** worldwide visited a social networking site in July 2009, **increasing 18 percent** from the previous year
 - Facebook: 370 million
 - MySpace: 123 million
 - Hi5: 59 million
 - Orkut: 55 million
 - Twitter: 52 million
- Social networking sites **reach nearly 70 percent** of the total global online audience, ranking as one of the most popular categories on the Web
- Social networkers visited the category an average of **20 times** during a month and spent a total of **4 hours** on social networking sites

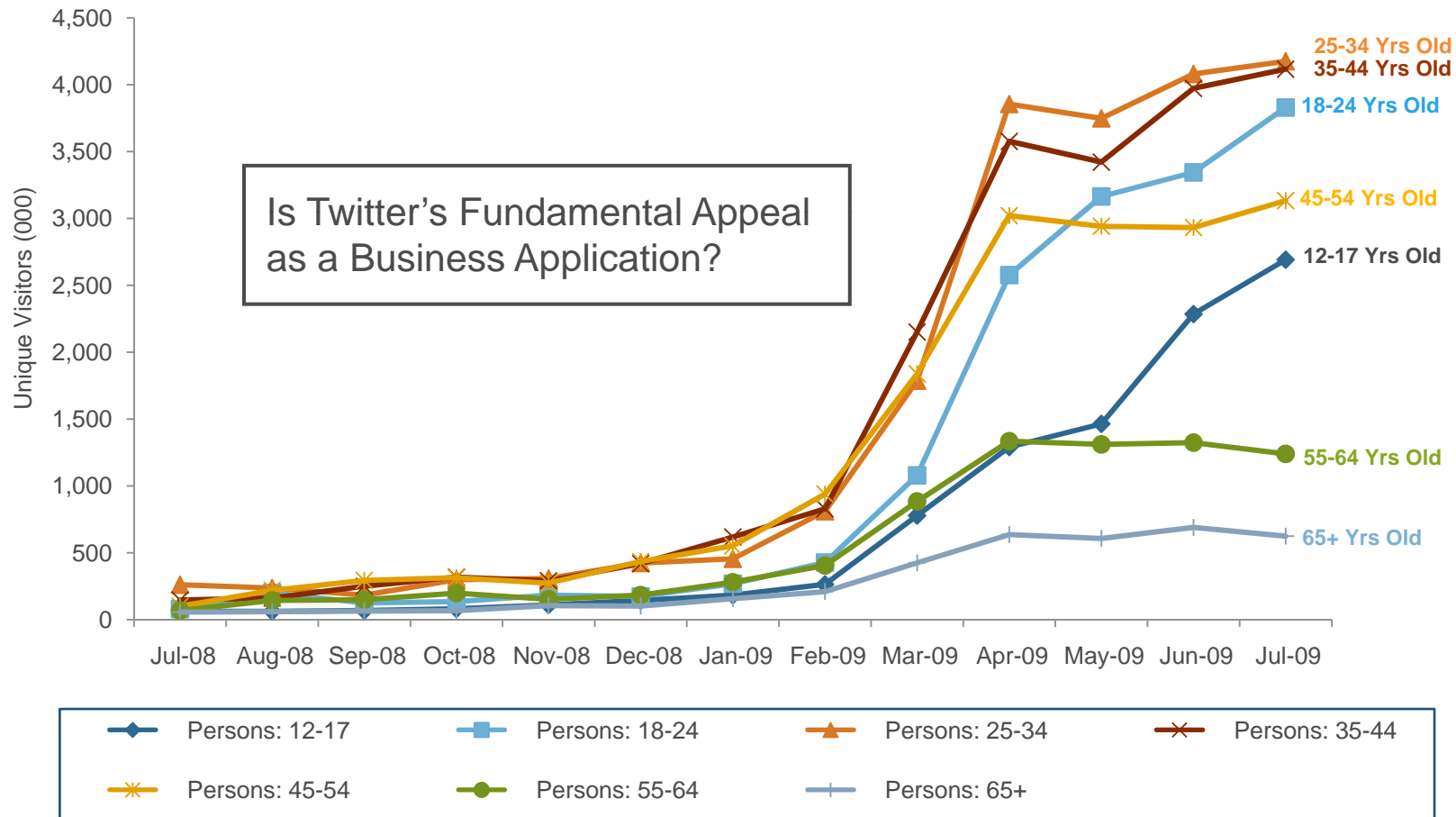
Heavy Social Network Users* Have Distinct Usage Patterns

- They spend more than **twice as much time** online as the average Internet user.
- They represent **15.4% of all Internet users** but account for over **35.6% of the Page Views** consumed online
- They visit a Social Network an average of **2.4 times a day** and spend **31 minutes** per day on social networks
- They spend **twice** as much time on social networks as they do on **email or IM**

* Defined as the heaviest 20% of social network users

Twitter's initial success in the U.S. was led by older segments, but recent growth has come from younger users.

Number of Unique U.S. Visitors (000) to Twitter.com by Age Segment
 Source: comScore Media Metrix



Top Social Networks Vary by Country but Facebook is the Clear Global Leader

Leading Social Network by Region

North America

United States

facebook

Canada

facebook

Latin America

Brazil

orkut

Chile

facebook

Europe

Germany

studivz

UK, France

facebook

Russia

В КОНТАКТЕ

Asia Pacific

China

Baidu 百度

India

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Japan

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Omniure & comScore Partnership: More Comprehensive Measurement: Critical for Social Networks

- Turnkey hybrid audience measurement solution
 - Tag Once, Measure Twice
- Measure total audience landscape, beyond home and work
- Automation leverages Omniure tags already in place
- Consistent measurement across geographic borders

Start your engines.
The industry is about to advance.

From Zero to 360



Announcing a streamlined solution to panel and server data reconciliation that finally takes comprehensive audience measurement full circle. **Get Started Today >**

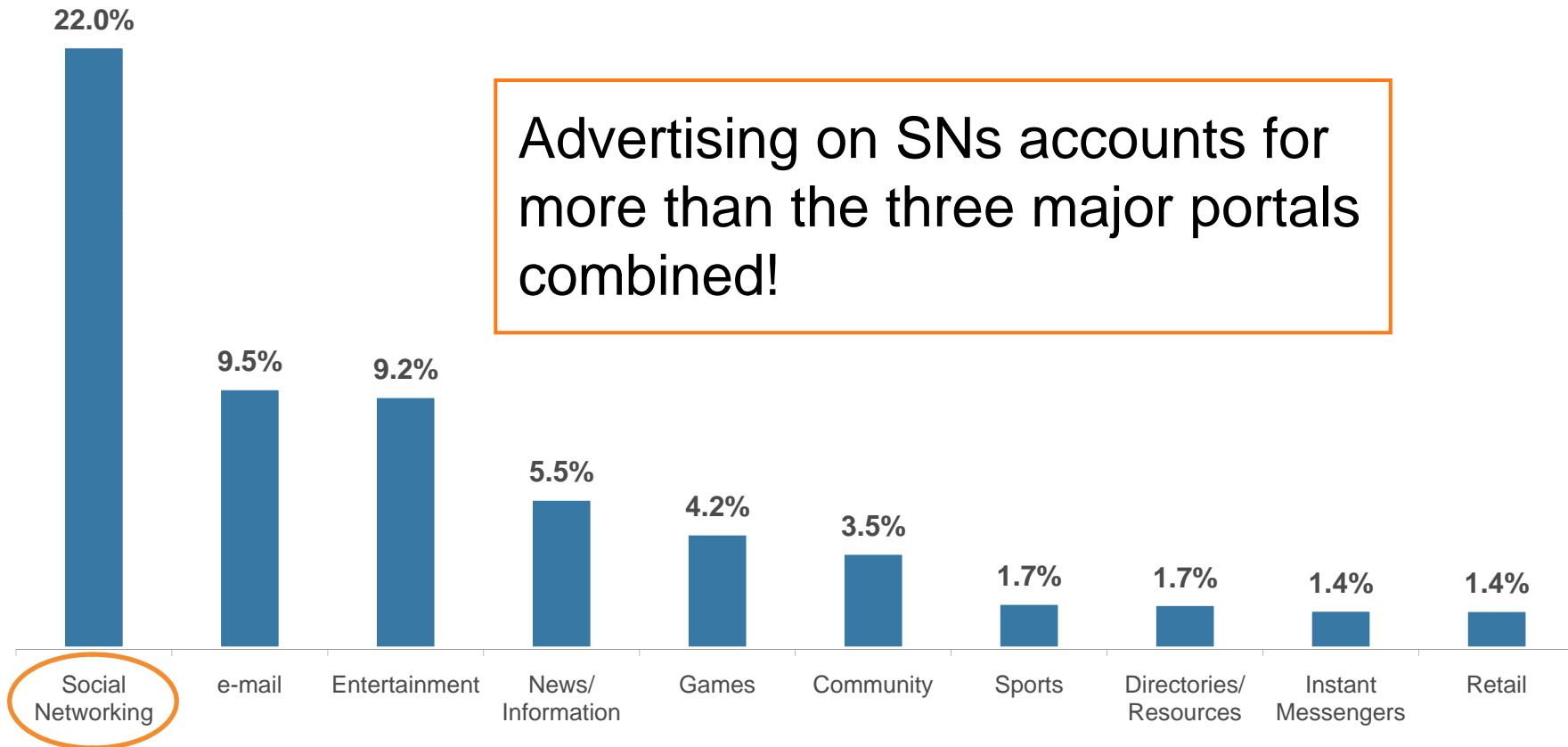
Advertising on Social Networks

**“Facebook Became Cash Flow Positive
In Q2 2009”**

Mark Zuckerberg, CEO, Facebook

Social Networks Account for More than 20% of All Display Ad Impressions

Top Content Categories by Share of Total Display Ad Impressions in July 2009
Source: comScore Ad Metrix



Many CPG Companies Testing Social Network Advertising but No Major Commitments as Yet ...Lack of the Right Metrics??

Ranking Based on Number of Impressions on Social Networks

CPG Company

- **Weight Watchers #20**
- **Unilever #42**
- **Mars #45**
- **Kraft #54**
- **Target #58**
- **Coca Cola #60**
- **J&J #74**
- **Allergan #89**
- **P&G #91**
- **Nestle #99**

CPG Company

- **Anheuser Busch #102**
- **Dr. Pepper Snapple #118**
- **Miller Coors # 125**
- **Wal-Mart #127**
- **General Mills #132**
- **PepsiCo #133**
- **Nutrisystem #138**
- **Walgreens #139**
- **GSK #170**
- **L'Oreal #173**

'ROI' Metrics Must Cover a Range of Campaign Objectives

- **Opportunity to See**
 - How many impressions hit the intended target?
- **Branding**
 - Awareness, recall, likelihood to recommend
- **Online engagement**
 - Frequency of visitation, depth of engagement, search, share of duration
- **Online transactions**
 - Online purchase, insurance quote, credit card application, configure a car
- **Offline transaction**
 - Purchase in a brick and mortar outlet, buy a car

Advertisers must be able to choose their 'money metrics'

Advertising on Social Network Sites Can Lift Offline Sales

Case Study: MySpace Advertising Campaign for CPG Brand

Campaign Objectives

- **Introduce the Personal Care Brand to consumers of various ages across MySpace**
- **Create an experience that allows Personal Care Brand consumers to interact with the brand in a fun, unique, way**
- **Raise awareness around the new product**

Study Objectives







- **Measure the impact of the Personal Care Brand MySpace campaign both online and offline**
 - **Brand Awareness, Perceptions**
 - **Offline Sales Lift – comScore/dunnhumby match panel**
 - **Visitation to MySpace ad community pages, advertiser site, and sites in the advertisers' category – comScore panel**



comScore's Analytical Design

- **Real world analysis: comScore panelists divided into matched groups (exposed and non-exposed to advertising)**
 - Exposed to Campaign Ads
 - Not Exposed
- **Passively measured behavior:**
 - Online activity through comScore behavioral panel
 - Linked to in-store buying through retailer loyalty cards and POS scanner data
- **Analytical design compares behavioral changes in test and control groups from pre-campaign to campaign time periods**

Branding Metrics Increased Significantly Because of MySpace Ad Campaign

Impact of campaign on Parent and Sub-brand measured via survey, intercepting MySpace users throughout the site, prior, during and post campaign

Measure	Pre vs. Campaign	% Lift	Pre vs. Post	% Lift
Parent Brand Awareness (Unaided)		+11%		+9%
Sub-brand Awareness (Aided)		+24%		+13%
Intent to Purchase Sub-brand		18%		---

-  Lift significant at 90% significance level
-  Directional Lift significant < 90%
- Unchanged

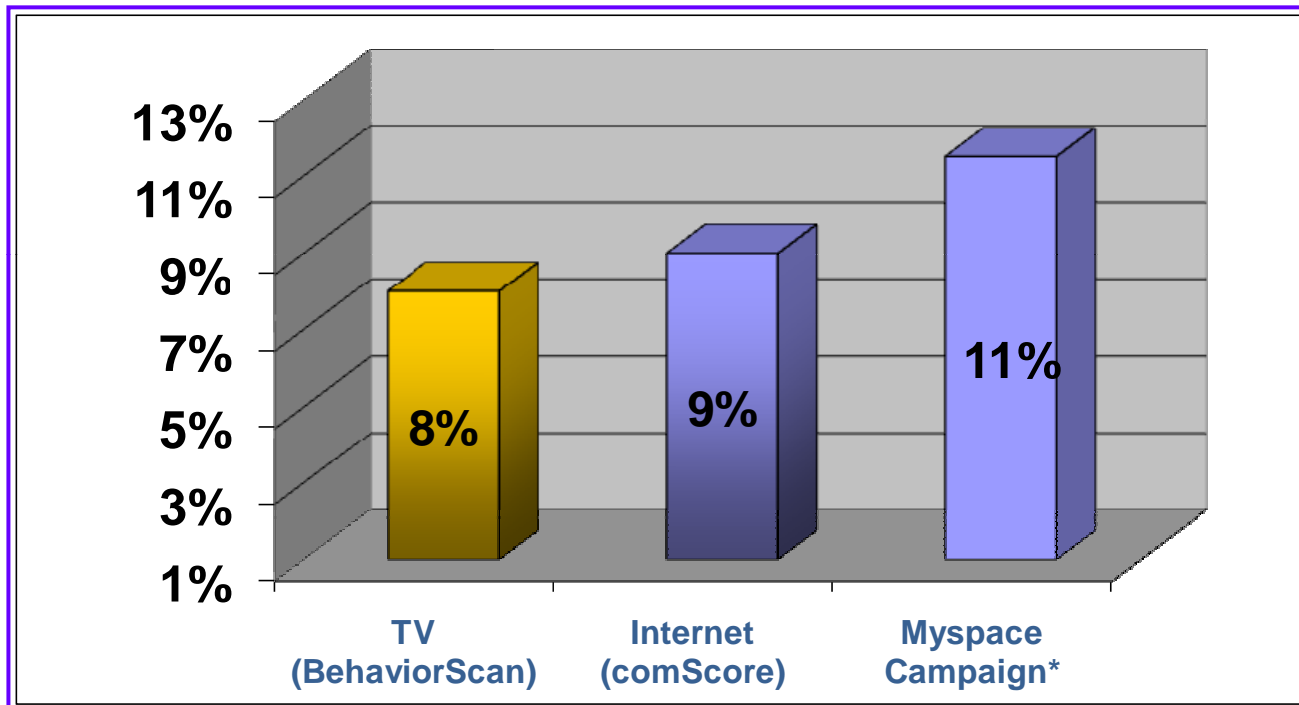
Importantly, Both Sub-Brand and Parent Achieved Higher Sales in Retail Stores as a Result of Ad Campaign

Measures	Sub-brand	% Lift	Parent	% Lift
Dollar Sales/HH	●	17%	●	23%
Units/HH	●	11%	●	7%

- Lift significant at 90% significance level
- Directional Lift significant < 90%
- Unchanged

This Campaign Compares Favorably to comScore online CPG Norms and IRI's TV Norms for CPG Brands

BehaviorScan tests conducted over one year period. comScore studies over three months
Assumes 40% Internet Reach Against Target



Online's Superior Targeting Ability Appears to be
The Key Differentiator

* My Space campaign adjusted to 40% reach for an apples to apples comparison

In Conclusion, Have We ‘Cracked the Code’ for SN Measurement?

- **Hybrid solution blends ‘best of both worlds’**
- **Comprehensive measurement across locations and devices**
 - Home, work, internet cafes, mobile
- **Global measurement of audiences is key**
 - Consistent audience measurement across geographic borders
- **OTS: Need to understand which people (not machines) in your target saw ads placed on social networks, and where they saw them**
- **Advertising effectiveness approach is both broad and deep**

Not Yet, But We’re Making Progress!