

eMarketing: The essential guide to marketing in a digital world

Rob Stokes

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eMarketing

The essential guide to marketing
in a digital world

5th Edition

Rob Stokes
and the Minds of Quirk

Fifth Edition

eMarketing: The essential guide to marketing in a digital world

By Rob Stokes and the Minds of Quirk

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eMarketing: The essential guide to marketing in a digital world

Fifth Edition

By Rob Stokes and the Minds of Quirk

I am immensely proud to present the 5th Edition of the Quirk marketing textbook. It is now 6 years since we began work on the first edition, and it's quite amazing to see how much it has grown. Not only in line with the changes in our industry, but also through very important input from our passionate and kind community of learners and educators.

The evolution of the discipline of marketing is best represented by the change in the subtitle of our book. When we started, this book was called eMarketing: the essential guide to digital marketing. Today as you will see, we have adjusted this to eMarketing: the essential guide to marketing in a digital world. This change has been an easy and natural one. It underlines an important shift in the way we think about and engage with digital. Digital is not a channel in the same way that a marketer might view television or radio as a channel. Instead digital is a way of life. It is the experiential glue which binds previously separated media together. Because of this, digital enables a cohesive brand experience that wasn't previously on offer. In fact, it's highly likely that within the next edition or two, we will need to acknowledge this shift in the role of digital by ditching the "e" in eMarketing. At best it is quickly becoming passé, at worst it will become completely redundant.

At Quirk, we no longer see ourselves as a digital marketing agency, but rather as a marketing agency born digital. We still consider ourselves to be experts in the digital realm and as digital natives we still have bits and bytes coursing through our veins. However it is because of our understanding of brands and how to build them in a digital world that our clients are turning to us for far more than just a website or some SEO. Today we find ourselves as lead agency on a number of prestigious brands. These brands see that their customers are living in a digital world and therefore trust a partner like Quirk to lead them in that world.

Our textbook is now used in almost 1000 academic institutions globally. This is largely due to brave and forward thinking educators to whom we owe a huge debt of gratitude. They have walked a journey with us, embraced a book published by an agency (a fact which hasn't gained easy acceptance by the very traditional academic community), and have provided us with tremendous encouragement and invaluable feedback to ensure that this book keeps pace not only with a fast moving industry, but with their evolving needs as well.

We believe in education. Educated people make better decisions and have more potential for an improved life. We also believe that particularly for tertiary education to have an effective future a partnership between the private and academic sectors is vital. It ensures the very best education is as accessible as it can be to as many people as possible. By making our textbook available for free online we hope to propel this dream forward. In fact, less than 10% of the many institutions who use our book actually pay for it and we are thrilled by this. At Quirk we want to make a dent in the world and this is an important part of us achieving that.

Another important change for this edition has been the appointment of our academic partner, Red & Yellow, who have helped us improve the pedagogy and academic rigour of the textbook. Founded twenty years ago in 1994, Red & Yellow is one of South Africa's leading marketing colleges. Last year Quirk Education merged with Red & Yellow to form an academic institution which we believe will serve its students very well into the future. This new entity combines Red & Yellow's tremendous experience in marketing's academic space with Quirk's digital skills and online training expertise. Relevant and practical content can thus be delivered through the methodology best suited for the student – online, contact or a hybrid of both. In order to effectively join forces, we must see the end of the Quirk Education brand. This is slightly sad for me, but is part of an important evolution and I am immensely excited about the high quality of students Red & Yellow is already producing at this early stage of their combined adventure. The future holds great promise indeed.

From a content perspective, this book is a real step up from the previous edition. As with the 4th Edition, we've maintained Quirk's **Think, Create, Engage** and **Optimise** structure. We have, however, worked much harder to acknowledge the useful links between disciplines throughout the book. The lines between disciplines in the media landscape can be blurry, but we find the TCEO structure gives us an effective way of tackling the big picture explanation for comprehension. This foundation then enables us to focus on the nuance where the rubber hits the road.

Apart from a general update of facts, stats and case studies, we've made a few other important changes. Firstly the Think section has been expanded, with a much improved market research chapter and the addition of content strategy chapter as well. The section is better equipped as a platform for approaching the rest of the book and the marketing process in general. In the Create section we've added a chapter on User experience design and in the Engage section the Video Marketing and Mobile chapters have been greatly expanded to reflect their growing importance in the marketing landscape.

The last update is a valuable one for readers of the printed edition. Because the book is available for free download we wanted to give you extra reason to part with your hard earned cash when buying a printed copy. To achieve this, we've partnered with many great vendors to provide a wide array of useful vouchers that will help you get started with what you learn from this book.

I started Quirk almost 15 years ago. Whilst we've grown successfully as a business over that time this textbook remains my proudest achievement even though I didn't write it. I may have had the original idea, but it's a team effort and I wouldn't want to take that away from the people who have worked so hard to make it a reality. Putting each edition together takes a huge amount of work by many people. My name is on the front purely because someone's name has to be on the front. Thankfully the font gets smaller and smaller every year.

In particular I want to recognise Kat Scholtz who has overseen the production of this 5th Edition. I have worked with Kat for over 5 years now and you just couldn't find a better qualified person to lead such an effort. I mean this both from a skills and experience perspective as well as the deep passion and excitement Kat has for producing a great resource which we know will help many hundreds of thousands of people. Kat has also surrounded herself with a phenomenal knowledge team whose job it has been to synthesize the knowledge of our agency into an easy to use guide which is accessible to all. To Kat and her team, from the bottom of my heart I thank you so very much for your incredibly hard work in making this dream a reality. You deserve all the credit for this fantastic book.

I'm proud of the book because it genuinely is good and it is genuinely free. To have brought Quirk to a place where it can afford to make this contribution to our industry and community is an incredible feeling.

We hope you enjoy our book and remember, the most important thing any human can do is teach, even if you're not a teacher. Share your knowledge and make the world a better place.

Onwards and upwards!

Rob

Some thoughts on Marketing from Seth Godin.

I don't think you'll learn much from this textbook. It's nothing specific--I actually don't think you can learn how to market from any textbook. As marketing textbooks go, this is a very good one, but still, it's not going to work.

It's not going to work because marketing is about nuance, experience, experimentation and passion. And I don't have a clue how you could start from scratch and learn that from a textbook, no matter how good.

So, what to do?

The first thing you should do is obsess about the terms in this book. Vocabulary is the first step to understanding, and if you don't know what something means, figure it out. Don't turn the page until you do.

Second, get out of the book. Go online. Go market.

There are very few endeavors that are as open to newcomers, as cheap and as easy to play with. You can't learn marketing without doing marketing. Go find a charity or a cause or a business you believe in and start marketing. Build pages. Run ads. Write a blog. Engage. Experiment.

If you don't learn marketing from this process (the book for vocabulary, the web for practicing) then you have no one to blame but yourself. You've already made the first step, don't blow it now.

We need you. Market what matters.

Seth Godin

*Author
Purple Cow, Permission Marketing and Linchpin*

Reviews for eMarketing:

The essential guide to marketing in a digital world

Fifth Edition

Most people are looking for definitive answers in the digital space and you will find there are not many. It is all about an approach and finding the solution that best suits your company, strategy and organisational needs. The insights and approach provide a well structured guide to the channels and approaches that you will need to consider as you navigate the digital highway. A great companion to help you in your journey.

Richard Mullins, Managing Director MEA, Acceleration

For a comprehensive source of digital marketing information, the eMarketing textbook provides an insightful guide to the digital world with this ever changing and dynamic environment. Having had invaluable input from the top minds in the SA digital industry, the publication renders credible content which can be put to task in the real time digital industry.

Nic van den Bergh, Founder & Director of Macula

Reviews for previous editions

I found eMarketing: The essential guide to digital marketing to be an excellent guide on digital marketing. The book covers all the essentials that someone would need on digital marketing. Rob Stokes and the Minds of Quirk provide an excellent approach with their think, create, engage, and optimize framework. This framework allows the reader to think carefully about their overall strategy, the web assets that they need to create, and how to effectively engage with their audience through multiple digital vehicles. Additionally, Rob Stokes and team provide a great overview on how to measure and optimize one's activities in digital via web analytics and conversion optimization. This book provided me with a solid background on all aspects of digital marketing. It allowed me to build and accelerate on my foundation in digital marketing. I still use the book as a handy guide, especially for its glossary of terms. This book is a great one stop place for everything important to know about digital marketing.

Phillip Leacock, Digital Marketing Director, Sears Home Services

eMarketing is comprehensive and a 'must have' for anyone wanting to gain a more thorough understand of digital marketing. It's 'required reading' for people working in the digital space, and 'recommended' for those involved in advertising, PR, social media and other areas that are 'touched' by digital. Having this book on your desk as a reference tool will keep you ahead of the game.

I have found myself dipping in and out of it over the past few months, reaching for it when I needed more information on a particular area of digital marketing, or clarification of a technical term or phrase.

Trevor Young, Director of strategy and innovation, Edelman Australia

If you aren't a marketer, this is a must have book; if you know a marketer, do him or her a favour and get it for them; if you are just interested in eMarketing and want to expand your general business knowledge, buy two copies – someone will want to borrow them from you.

Jaco Meiring, Digital – Investec

Quirk's eMarketing handbook covers all the most important concepts which are necessary for eMarketing excellence today. I would highly recommend it as both a study guide and a practitioner's reference manual. Congratulations to the QuirkStars on all the thought, research and work that has obviously gone into this.

*Dave Duarte, founder and director of Nomadic Marketing,
UCT Graduate School of Business*

I found Quirk's eMarketing textbook for my New Media Marketing class while searching for a low cost alternative to keep textbook costs down for my students ... I found Quirk's eMarketing textbook to be very well written, concise and to the point regarding what people should know about internet marketing, as well as being fairly comprehensive in the topics covered.

Karl Kasca Instructor at UCLA Extension

The Cape Town Open Education Declaration is the product of a meeting in the Cape Town of a coalition of educators, foundations, and Internet pioneers in September 2007. The meeting was organised by the Open Society Institute and the Shuttleworth Foundation. Linux entrepreneur Mark Shuttleworth said, "Open sourcing education doesn't just make learning more accessible, it makes it more collaborative, flexible and locally relevant." The Declaration's principles of openness in education and knowledge sharing resonate strongly with us.

To show our commitment to the Open Education Declaration, all of the contents of the textbook are freely available online, as are supporting materials for lecturers and for students. We know how quickly things change when it comes to the Internet, so we are committed to regularly updating this resource. A free download of the textbook and further materials and resources are available at www.redandyellow.co.za/textbooks/digital.

For more information on the Open Education Declaration, and to add to your name to the list of individuals committed to this cause, you can go to www.capetowndeclaration.org.

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Red & Yellow's teaching material is recognised as the latest available knowledge in a constantly evolving field. *eMarketing: The essential guide to marketing in a digital world*, for example, is used in some 500 universities and colleges around the world. Our knowledge and practical education are delivered in the form of textbooks, online short courses, degrees, diplomas, workshops and bespoke training.

A gift from Quirk and Red & Yellow

Quirk is a marketing agency born digital. An agency where a culture of learning, innovation and curiosity allows some of the best and brightest minds in the business to push the boundaries of creativity and technology.

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The first edition of *eMarketing: the essential guide to digital marketing* was published in 2008. It wasn't our plan to write the equivalent of a book every year – but rapid sales, along with the ever-shifting digital landscape and an edition that was published exclusively in the United States means that we are now on our fifth edition. This is an achievement that we are very proud of.

Once again, we have drawn on the expertise of professionals and agencies in our network and used their feedback to ensure that this book is representative of the most recent developments in our fast-paced industry.

This edition has a slightly different title: *eMarketing: the essential guide to marketing in a digital world*. This reflects our insight that digital is more than just a channel and that the basic principles of marketing remain the same; we simply have an ever-evolving array of technology to apply them through.

The book is structured similarly to the fourth edition, enabling readers to follow it sequentially and get an overview of how the different elements of digital fit together, while also providing a guide for those who want to dip in and out of chapters or need to brush up on specific areas.

The book is structured according to how the Quirk agency works:

- **Think:** we research, plan and strategise for brands and campaigns
- **Create:** we build beautiful, highly functional assets and content for those brands and campaigns
- **Engage:** we use the power of the connected web to drive traffic to those assets and leverage the available channels to build strong customer relationships
- **Optimise:** we relentlessly use data and analysis to improve all our marketing efforts

Some of the content is wholly new (Content Strategy, User Experience Design), some of it has been conceptually overhauled (Digital Strategy, Mobile Marketing, Web Development and Design, Market Research, CRM, Video Marketing) and some of the core topics remain similar but are fully up to date to reflect the latest changes in industry globally.

Within each chapter, there are notes along the way to point you in the direction of further material and, at the end of each chapter, there are links to some great blogs or books relevant to that chapter. If you want to keep up to date, these resources are a great place to start.

When you've finished reading, the next important step is to start doing! Put what you have learnt into action. Throughout the book, we have listed low- and no-cost ways to get started – all that's needed is your brain, some enthusiasm and some time. There are several vouchers in the print edition of the textbook, so you can get started with the practical application of what you have read. If you don't want to experiment with your own business, help out a friend!

Good luck and have fun.

**Wishing you digital success,
The QuirkStars**

01

Situating
digital in
marketing

1.1 Introduction

Today, no marketing strategy is complete if it does not incorporate digital strategy and expression. Understanding digital requires thinking beyond any one tool or channel, and towards an exchange of value: an economic system trading with attention as currency.

What is digital? Bud Caddell defines 'digital' as "a participatory layer of all media that allows users to self-select their own experiences, and affords marketers the ability to bridge media, gain feedback, iterate their message, and collect relationships" (Caddell, 2013). In other words, digital is a new way of exploring content (for users) and connecting with customers (for marketers).

Digital is not just a set of marketing channels – it's a different way of thinking about how people engage with media, each other and the world around them. Digital enables you to segment your audience and customise messages in a valuable and measurable way. The availability of information, our inherent desire to contribute, and user-friendly technology have rewritten the rules of engagement. People are not passive consumers; they are empowered as publishers, editors and commentators. The conversation is multi-directional and usually not started or controlled by brands.

In this chapter, you will gain:

- An understanding of the role digital can play in a marketing plan
- An approach to reaching people in a world of digital tools
- Insight into how to get the most out of this textbook

1.2 Understanding marketing

Before we can delve into digital marketing, it's important to understand the fundamentals that underpin marketing itself. After all, digital marketing has the same purpose, intentions and objectives.

Dr Philip Kotler defines marketing as follows, "Marketing is that function of the organisation that can keep in constant touch with the organisation's consumers, read their needs, develop products that meet these needs, and build a programme of communications to express the organisation's purposes".

(Kotler and Levy, 1969: p 15).

1.3 Understanding digital marketing

How does digital marketing fit into this definition? There is, in fact, no basic difference between 'traditional' marketing and digital marketing. They are one and the same.

Ultimately, the aim of any type of marketing is to keep customers and stimulate sales in the future. Digital communication tools make it possible to connect and build long-term relationships with customers.

Digital marketing helps to create consumer demand by using the power of the interconnected, interactive web. It enables the exchange of currency but, more than that, it enables the exchange of attention for value. This is referred to as the attention economy.

Digital marketing is powerful in two fundamental ways. First, the audience can be segmented very precisely – even down to factors like current location and recent brand interactions – which means that messages can (and must) be personalised and tailored specially for them.

Second, the digital sphere is almost completely measurable – every minute and every click by a customer can be accounted for. In digital you can see exactly how various campaigns are performing, which channels bring the most benefit, and where your efforts are best focused.

1.3.1 Crowdsourcing

Crowdsourcing is a powerful example of the way digital tools have enabled certain ways of thinking. In simple terms, crowdsourcing is a distributed problem-solving and production model that relies on an active community to find solutions to problems. Crowdsourcing relies heavily on the tools and communication forms made possible by the Internet.

Given that the Internet connects people all over the world through different publishing tools and technologies, the information and ideas on these channels have become commodities in themselves. In the past, we had to gather physically to create crowds. Now, with technology, crowds can be closely connected while being geographically distant.

By listening to the crowd and asking for their contributions, organisations can gain first-hand insight into their customers' needs and desires, and build products and services that meet those needs and desires. With an earned sense of ownership, communities may feel a brand-building kinship with the community through collaboration and contribution.

Using the Internet, a savvy organisation can tap a wider range of talent and knowledge than is contained in its own resources. Tapping into this resource can be done in one of three ways:

1. **Crowdsourcing**, which involves asking and enabling people to share their ideas or creations in exchange for an emotional or monetary reward. This is the most common type used for marketing and idea generation. Websites such as Threadless (www.threadless.com), Idea Bounty (www.ideabounty.com) and Wikipedia (en.wikipedia.org) are prime examples of crowdsourcing.
2. **Crowdfunding**, which involves asking many people in a large crowd each to donate a small amount of money in order to gather a large sum to fund a specific project or venture. Kickstarter (www.kickstarter.com) is a well-known platform where people who want to start projects can ask for backers to fund them. The higher the contribution, the more the backer will receive once the project is complete.
3. **Microtasking**, which involves breaking a big task or project down into tiny components and asking many people to each complete a few of these components, usually for payment. One company that uses microtasking is BrandsEye (www.brandseye.com), which pays members of its crowd to evaluate the sentiment behind mentions in social media.

Communities that use crowdsourcing platforms exist for different reasons. Some exist because there are people who have a keen interest in and affinity for those brands. They participate in the community because they want to improve the products and services they receive. Others want to gain a monetary reward or the prestige of devising the winning solution.

Whatever the case, crowdsourcing demonstrates the power of the Internet – it connects people, builds communities, spreads messages, and taps into a global source of ideas and inspiration.

1.3.2 Digital audiences

Both the media landscape and people's media habits have changed. There are many fragmented and highly specific niche communities at play across multiple digital media channels.

At the same time, people's attention is fragmented by the many new media channels and tools available – on top of traditional media, we now have social networks, emails, web tools, mobile devices and more splitting our attention. With so many choices and too little time, audiences have become very skilled at ignoring marketing messages.

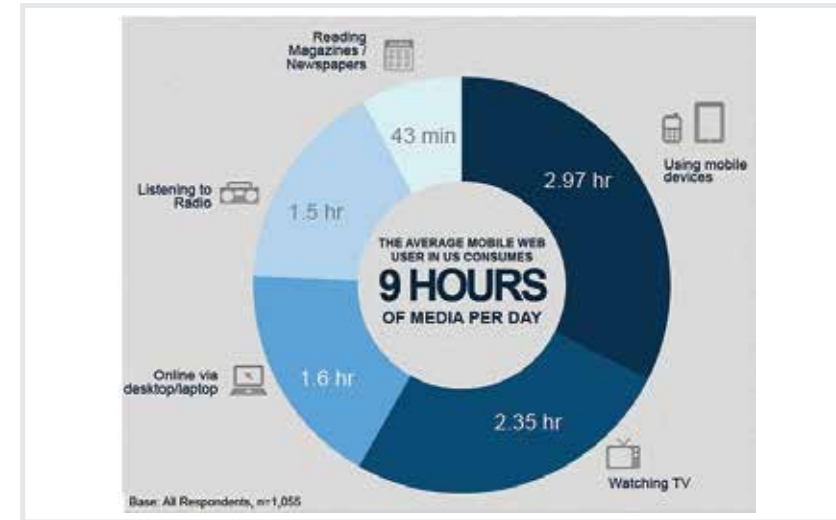


Figure 1. The ways in which people use digital media. (Source: InMobi,2012)

The key to succeeding is two-fold: ideas must be remarkable, and you must find a niche group who are obsessed with your product and willing to devote their scant attention to it. These fans may tell their friends and, in doing so, spread the word over their interconnected digital networks. If most consumers are likely to ignore your marketing message then the goal is to speak to those who are actually listening.

This leads to another key digital consideration. These days, people themselves are media channels. After all, most of us create, share, comment on and link to content that we find interesting – or that we think will interest our friends and followers. These personalised digital broadcasts are intercepted by people who are interested in what we are saying and have chosen to listen to us. Through this, individuals have become conduits for information, ideas and news in a powerful way.

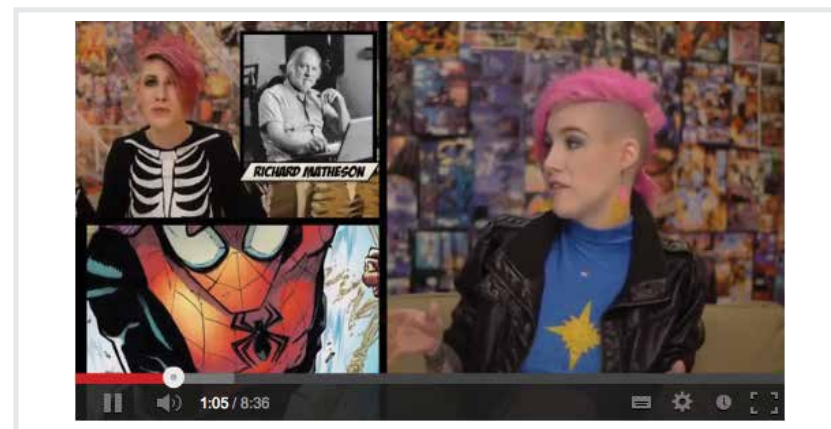


Figure 2. YouTube user ComicBookGirl19 broadcasts valuable content.

This exchange of ideas comes down to creating communities and nurturing relationships. Digital helps us to understand these relationships better.

1.3.3 Segmenting and customising messages

All of these ideas about niche communities, influential media personalities and fragmented attention spans tie in to the ability to segment online audiences and customise messages.

Segmentation is the process of taking a single, general audience and dividing it up according to specific groupings or characteristics. Once this is done, each group can be targeted differently depending on their needs from the brand. For example, a bank may serve a wide range of customers, but the messages it sends to segments such as young high-income earners, small-business owners and retirees will be very different – necessarily so.

Digital offers a wealth of user information, the ability to target users based on these factors, and the availability of technology for creating and managing large databases. In digital marketing segmentation, customers can be reached across a wide range of communication channels depending on their preferences and needs. The focus should not be on separate channels, but on how digital channels can enable and work with the strengths of what may be considered 'traditional' media such as TV or billboards. Today, digital often plays the role of a bridge for customers between different marketing media, allowing them to respond to a broadcast message on TV through a social media property for instance, where they can obtain a deeper, richer and more interactive brand experience.

Once an audience segment has been created, the message sent to it can also be customised (often automatically) thanks to the availability of the necessary information and digital tools. This can be as small as adding the customer's name to an email greeting, or as significant as tailoring an entire page of content to their buying history, connections and brand interactions. For example, Amazon provides product recommendations to users based on the items that they have bought as well as similar products purchased by others.



Figure 3. Amazon recommends items based on past purchases and views.

1.3.4 Measurability

The second factor that distinguishes digital is its measurability. Because of the technology on which it is built, almost every action on the web can be tracked, captured, measured and analysed.

The benefit for marketers should be clear. While traditional media are undoubtedly effective, it's sometimes hard to know exactly what is working, how well it's working, and why. Digital can help you pinpoint the success of campaigns down to the channel, audience segment, and even time of day.

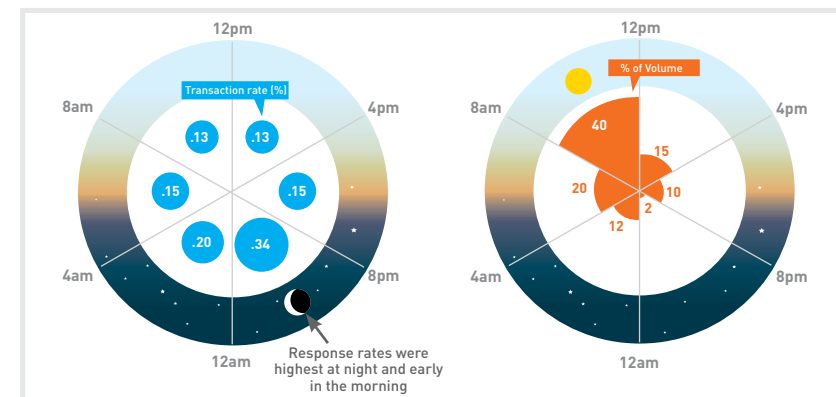


Figure 4. Measuring online data can tell you, for example, when the best time is to send an email. (Source: Harvest Retail Marketing, 2013)

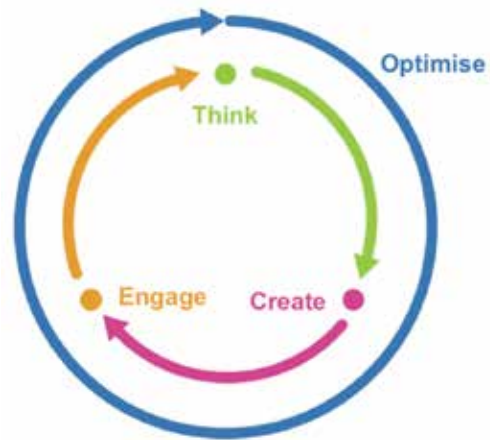
Web analytics – the discipline of tracking, analysing and drawing insight from online data – can also go a step further to helping a marketer understand the audience's intent. While the data merely answers what people are doing, looking at this in conjunction with other insights can help you understand why they are doing it as well.

Measurability in digital is not just about understanding the technology, although that is a necessary first step. It's about understanding how people and technology intersect – with the ultimate goal of using this information to craft the most effective and relevant marketing messages. As Kotler would say, it circles back to the notion of "creating and satisfying customers at a profit" (Kotler, 1991).

1.3.5 The TCEO model

There are many models for approaching digital marketing but we have found it most effective to group it into four interrelated disciplines: Think, Create, Engage and Optimise. This grouping creates a process that will result in the optimal use of digital tactics.

The diagram below illustrates the interrelation between the disciplines and highlights how the Optimise function should be present at each stage:



THINK is the starting point in our approach. It is tasked with developing strategic plans for the digital world. Like traditional communications planning, it includes topics such as consumer insights, research, concept development, budget allocation and channel planning.

CREATE brings concepts to life by executing campaigns and shaping platforms. It covers all aspects of creating web assets, from web design and development to conceptual copywriting, the creation of social media assets, mobile development, engineering business systems and social media integration.

ENGAGE is responsible for driving traffic and building relationships. Media buying and planning, search engine optimisation, email marketing, social media and campaign management are some of the key activities here.

OPTIMISE is about continuous improvement. It delivers insight and lessons through analytics, data mining, conversion optimisation and testing. Optimise is relevant at each stage of the process.

1.4 Accounting for change and how to use this book

It must be acknowledged that the term 'digital' is becoming increasingly insufficient for discussing the topics shared in this chapter. The idea of an analogue system is increasingly irrelevant and so referring to something as 'digital' can suggest a very broad meaning that, at its worst, is so vague that it becomes meaningless.

eMarketing, the title of this book, is also a term that has lost some relevance since our first edition. As the field matures and the effect of digital thinking, for lack of a better phrase, becomes both more evident and acknowledged, terms and practices will evolve to account for this.

For those with inquisitive minds who would like an introduction to how the Internet itself works (and we know there are many of you!), we have included a break down as an appendix at the back of this book. There you will also find a history of the Internet. Both sections contain valuable information that will likely inform your interactions on this powerful medium.

At its core, marketing is about conversations and the Internet has become a hub of conversations. The connected nature of the Internet allows us to follow and track these conversations and provides entry points for all parties. What follows in this book are ways of conversing with existing and potential customers using the Internet. This textbook can be read from back to front or used as a reference guide. Key terms, concepts and interrelated subjects are highlighted in each chapter. Apply the knowledge you gain for success and let us know how it goes!

1.5 References

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Part 1

Think

Introduction to Think

It seems too obvious to mention, but the foundation of consistently successful marketing communications lies in thorough planning and strategic preparation. Before you execute digital campaigns, you need to plan them. You need to research and understand your product, your communication challenge, your market, your competitors and, of course, your consumers. We call planning, strategy and research **Think**.

Think is the first step in a strategic process:

1. **Think:** Research, plan and strategise. Use the opportunities of digital to meet communication, market and product challenges. Plan assets and campaigns.
2. **Create:** Make beautiful assets, from websites and videos to banner adverts and applications.
3. **Engage:** Use channels to drive traffic to those assets and build relationships with customers.
4. **Optimise:** Track and analyse to understand how assets and campaigns are performing. Derive insight to improve and test assets and campaigns.

The first section of this book is devoted to Think.

Digital Marketing Strategy tackles how the Internet has changed and challenged the world in which we market, and how best to use digital tools and tactics for effective marketing strategies.

Market Research unpacks how to use the Internet to understand audiences and campaigns. The Internet was originally developed as an academic tool for sharing research. This is ideal for savvy marketers – this chapter addresses some considerations for online market research.

Content Marketing Strategy lays out the building blocks for effectively using content, not advertising, to reach audiences. Brands are required to think like publishers – which means a consideration of far more than just the end product. Content targeting, production, planning and distribution must be considered. This chapter lays out concepts and processes that assist in creating relevant content.

02

Digital Marketing Strategy

What's inside: An **introduction** to some **key terms and concepts** and a guide to **understanding strategy**. We look at the questions to ask when compiling a **digital marketing strategy**, and a **digital marketing strategy in action**.

2.1 Introduction

A strategy indicates the most advantageous direction for an organisation to take over a defined period of time. It also outlines which tactics and means should be used to execute this direction. Originating as a military term, strategy is about using your strengths, as well as the context in which you are operating, to your advantage.

In marketing, strategy starts with understanding what the business wants to achieve, or what problem it wants to solve. It then considers the context in which the business and its competitors operates, and outlines key ways in which the business and brand can gain advantage and add value.

In this chapter, you will learn:

- How to define and distinguish business strategy, marketing strategy and digital strategy
- The key building-block concepts that are essential to any strategy
- The questions that need to be asked when assembling a digital marketing strategy

2.2 Key terms and concepts

Term	Definition
Application programming interface (API)	A particular set of rules and specifications that software programs can abide by when communicating with each other. It serves as an interface between programs and facilitates their communication, similar to the way in which a user interface facilitates communication between humans and computers. APIs are often used by third-party developers to create applications for social media websites such as Twitter and Facebook.
Cluetrain Manifesto	A set of 95 theses organised as a call to action (CTA) for businesses operating within a newly connected marketplace.
Market share	In strategic management and marketing, the percentage or proportion of the total available market or market segment that is being serviced by a company.
Metric	A unit of measurement.
Online Reputation Management (ORM)	The understanding and influencing of the perception of an entity online. This entails ensuring that you know what is being said about you, and that you are leading the conversation.

Pay per click (PPC)	Pay per click is advertising where the advertiser pays only for each click on their advert.
Return on investment (ROI)	The ratio of cost to profit.
Really Simple Syndication (RSS)	RSS allows you to receive/syndicate this information without requiring you constantly to open new pages in your browser.
Search engine optimisation (SEO)	SEO is the practice that aims to improve a website's ranking for specific keywords in the search engines.
Short Message Service (SMS)	Electronic messages sent on a cellular network.
Simple Object Access Protocol (SOAP)	A simple XML-based protocol to allow for the exchanging of structured information over HTTP.
Strategy	A set of ideas that outline how a product line or brand will achieve its objectives. This guides decisions on how to create, distribute, promote and price the product or service.
Tactic	A specific action or method that contributes to achieving a goal.
WebPR	Public relations on the web. Online news releases and article syndication promote brands as well as drive traffic to sites.
eXtensible Markup Language (XML)	A standard used for creating structured documents.

2.3 What is marketing?

A simple definition for marketing is that it is the creation and satisfaction of demand for your product or service. If all goes well, this demand should translate into sales and, ultimately, revenue.

In 2012, Dr Philip Kotler defined marketing as “the science and art of exploring, creating, and delivering value to satisfy the needs of a target market at a profit. Marketing identifies unfulfilled needs and desires. It defines, measures and quantifies the size of the identified market and the profit potential” (Kotler, 2012).

In order to motivate people to pay for your product or service, or to consider your organisation superior to your competitors, you need to create meaningful benefits and value for the consumer. The value that a marketer should seek to create should be equal to or even greater than the cost of the product to the consumer. Doing this often and consistently enough will grow trust in and loyalty towards the brand.

2.4 What is digital marketing?

If marketing creates and satisfies demand, digital marketing drives the creation of demand using the power of the Internet, and satisfies this demand in new and innovative ways. The Internet is an interactive medium. It allows for the exchange of currency, but more than that, it allows for the exchange of value.

NOTE

What brand interactions have you had that you actually consider valuable?

A business on the Internet can gain value in the form of time, attention and advocacy from the consumer. For the user, value can be added in the form of entertainment, enlightenment and utility; content marketing is one powerful way to create value. The reciprocity of the transaction is what's important here – in other words, the exchange is a two-way street that provides benefit to both parties simultaneously.

The Internet has changed the world in which we sell. It is not a new marketing channel; instead, it creates a new paradigm for the way in which consumers connect with brands and with each other. The complete scope of marketing is practised on the Internet – products and services are positioned and promoted, purchased, distributed and serviced. The web provides consumers with more choice, more influence and more power. Brands have new ways of selling, new products and services to sell, and new markets to which they can sell.

The roles played by marketing agencies are shifting too. So-called 'traditional' agencies are getting better at digital marketing, while agencies that started out as digital shops are starting to play in the traditional advertising space. More than ever, integrated strategies that speak to an overall brand identity are vital to achieving an organisation's goals. Consumers are increasingly more fluent in their movement across channels and in their use of multiple of channels at once. They expect the same from the brands with which they connect. Anyone still thinking in the old 'traditional versus digital' dichotomy is sorely out of date.

However, marketing on the Internet does not mean throwing out the rule book on marketing and business principles. Instead, the Internet provides a new environment in which to build on these. Profit is still revenue less cost. The Internet does not change that.

Brands build loyalty among users who love their products or services. Users fall in love with products and services when their experience is tailored to their needs, and not the needs of the brand. More than any other type of marketing, digital marketing is measurable. This gives brands the opportunity to build tailored, optimised brand experiences for consumers.

2.5 Understanding marketing strategy

2.5.1 Business and brand strategy

Before you can delve into marketing strategy, take a step back and consider the business and brand with which you are working.

The end-goal of any business is to make money, in one way or another. Business strategy asks the questions: 'What is the business challenge we are facing that prevents us from making more revenue?' or, 'What business objective should we strive for in order to increase the money in the bank?'

The brand is the vessel of value in this equation. The brand justifies why the business matters, and what value it adds to people's lives. The value of the brand is measured in terms of its equity – how aware are people of the brand? Does it hold positive associations and perceived value? How loyal are people to the brand?

When you have the answer to this question, you can formulate a marketing strategy to address the challenge or objective you've discovered.

2.5.2 Marketing strategy

The purpose of a marketing strategy is to address a business or brand challenge or objective that has been revealed. An effective strategy involves making a series of well-informed decisions about how the brand, product or service should be promoted; the brand that attempts to be all things to all people risks becoming unfocused or losing the clarity of its value proposition.

For example, a new airline would need to consider how it is going to add value to the category and differentiate itself from competitors; whether their product is a domestic or international service; whether its target market would be budget travellers or international and business travellers; and whether the channel would be through primary airports or smaller, more cost-effective airports. Each of these choices will result in a vastly different strategic direction.

To make these decisions, a strategist must understand the context in which the brand operates: what are the factors that affect the business? This means conducting a situational analysis that looks at four pillars:

1. The environment
2. The business
3. The customers
4. The competitors

Here are some considerations and tools for conducting your brand's situational analysis.

Understanding the environment

The environment is the overall context or 'outside world' in which the business functions. It can involve anything from global economics (how well is the local currency performing these days?) to developments in your industry. Every brand will have a specific environment that it needs to consider, based on the type of product or service it produces.

NOTE

This answers the question: 'What external factors will have an influence on the marketing objectives you set?'

An analysis of the business and brand environment will typically consider political, economic, social, technological, legal and environmental (PESTLE) influences to identify a clear set of considerations or issues pertinent to the marketing strategy.

Understanding the business

There are several marketing models that can be used to understand the business and brand you are working with. Since it's essential for all marketing messages to encapsulate the brand's identity and objectives, this is a very important step.

A crucial consideration is the brand itself. What does it stand for? What does it mean? What associations, ideas, emotions and benefits do people associate with it? What makes it unique?

There are several levels of branding to investigate:

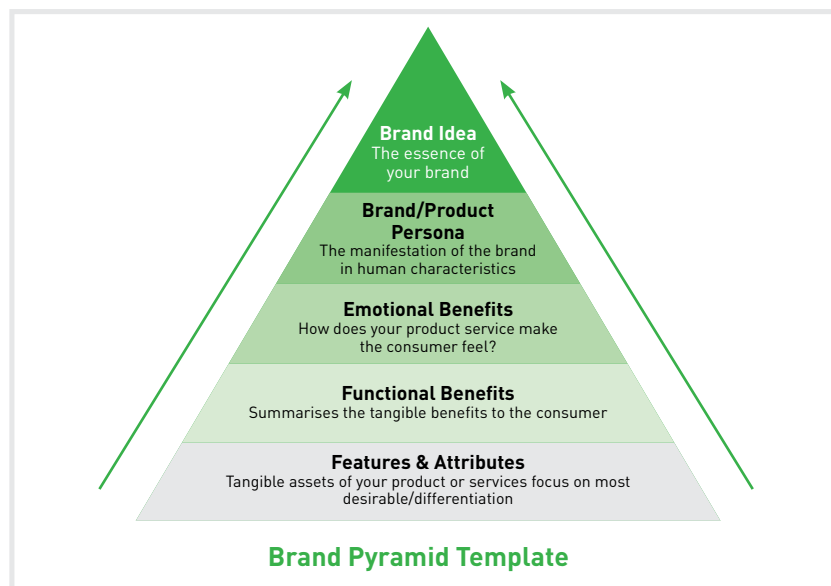


Figure 1. Understanding the business' brand. [Source: Adapted from Noesis Marketing, 2011]

Out of this, you can determine what the brand or product's unique selling point (USP) is. A USP is the one characteristic that makes your product or service better than the competition's – what unique value does it have? Does it solve a problem that no other product does?

NOTE

This answers the question: 'What are the special things about your brand that make it marketable and unique?'

Understanding customers

In order truly to understand your customers, you need to conduct market research (discussed in much more detail in the next chapter). Try not to make assumptions about why people like and transact with your brand – you may find their values and motives are quite different from what you thought. Ongoing research will help you build a picture of what particular benefit or feature your business provides to your customers, allowing you to capitalise on this in your marketing content.

One important area on which to focus here is the consumer journey – the series of steps and decisions a customer takes before buying from your business (or not). Luckily, online data analytics allow you to get a good picture of how people behave on your website before converting to customers; other forms of market research will also help you establish this for your offline channels.

On the Internet, a consumer journey is not linear. Instead, consumers may engage with your brand in a variety of ways – for example, across devices or marketing channels – before making a purchase.

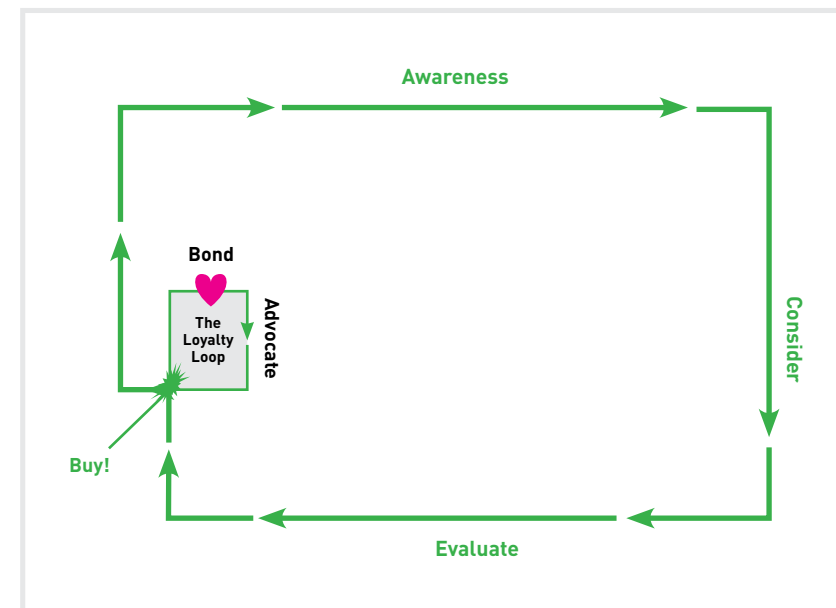


Figure 2. The customer journey is cyclical. [Source: Adapted from Brilliant Noise, 2012]

NOTE

The customer journey answers the question: 'What do people really want from your brand, and what would convince them that you offer this?'

The goal is to reach customers with the right marketing message at the right stage of their journey. For example, you may want to use aspirational messages for someone in the exploration phase, but focus on more direct features and benefits (such as a lower price) when they're almost ready to buy.

Understanding competitors

Finally, it's important to know who else is marketing to your potential customers, what they offer, and how you can challenge or learn from them.

On the Internet, your competitors are not just those who are aiming to earn your customers' money; they are also those who are capturing your customers' attention. With more digital content being created in a day than most people could consume in a year – for example, over 100 hours of video are uploaded to YouTube every minute (YouTube, 2013) – the scarcest resources these days are time, focus and attention.

When considering competition, it's also worthwhile looking at potential replacements for your product. The Internet is disrupting and accelerating the pace of disintermediation in a number of industries, meaning that people can now go directly to the business instead of transacting through a middleman (look at the travel industry as an example). To stay ahead, you should be looking at potential disruptors of your industry as well as the existing players.

NOTE

This answers the question: 'What can you do to stand out from the crowd?'

2.5.3 Digital marketing strategy

Once you have a clear sense of what the business challenge or objective is, and you have defined how your marketing strategy will work towards fulfilling it, you can start thinking about your digital marketing strategy.

Consider that in the early days of TV, when the new medium was not as yet entirely understood, there were separate 'TV planners' who created a 'TV strategy' for the brand. Over time, this was incorporated into the overall marketing strategy (as it should be).

The same is going to happen with digital. Increasingly, digital thinking is being incorporated into marketing strategy from day one. This section considers digital strategy separately in order to highlight some differences in approach, but this should change in practice over time.

Digital marketing strategy builds on and adapts the principles of traditional marketing, using the opportunities and challenges offered by the digital medium. A digital marketing strategy should be constantly iterating and evolving. Since

the Internet allows for near-instantaneous feedback and data gathering, digital marketers should constantly be optimising and improving their online marketing efforts.

User-centric thinking, which involves placing the user at the core of all decisions, is vital when looking at building a successful digital marketing strategy. The digital marketing strategist of today is offered not only a plethora of new tactical possibilities, but also unprecedented ways of measuring the effectiveness of chosen strategies and tactics. Digital also allows greater opportunities for interaction and consumer engagement than were possible in the past, so it is important to consider the ways in which the brand can create interactive experiences for consumers, not just broadcast messages.

The fact that digital marketing is highly empirical is one of its key strengths. Almost everything can be measured: from behaviours, to actions and action paths, to results. This means that the digital marketing strategist should start thinking with return on investment (ROI) in mind. Built into any strategy should be a testing framework and the ability to remain flexible and dynamic in a medium that shifts and changes as user behaviours do.

If we defined strategy as 'a plan of action designed to achieve a particular outcome', the desired outcome of a digital marketing strategy would be aligned with your organisation's overall business and brand-building objectives or challenges. For example, if one of the overall objectives were acquisition of new clients, a possible digital marketing objective might be building brand awareness online.

2.6 The building blocks of marketing strategy

The following building-block techniques will help you structure a marketing strategy – both online and offline – that addresses your core business challenges.

These strategy models are just starting points and ways to help you think through problems; as you grow in experience and insight, you could find yourself relying on them less or adapting them.

2.6.1 Porter's Five Forces analysis

Porter's Five Forces analysis is a business tool that helps determine the competitive intensity and attractiveness of a market. The Internet's low barrier to entry means that many new businesses are appearing online, providing near-infinite choices for customers. This makes it important to consider new factors when devising a marketing strategy.

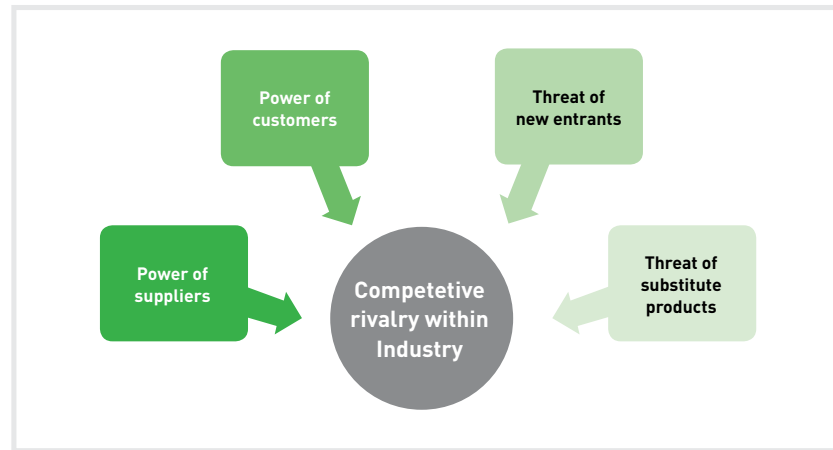


Figure 3. Porter's Five Forces.

2.6.2 The Four Ps

The Four Ps of marketing help you structure the components that make up a brand's offering, differentiators and marketing. They have been fundamentally changed by the Internet and need to be looked at in the context offered by digitally connected media and from the perspective of the consumer. How your brand is positioned in the mind of your consumer will ultimately determine your success.

1. Products (and services)

Products and services are what a company sells. The Internet enables business to sell a huge range of products, from fast-moving consumer goods and digital products such as software, to services such as consultancy. Online, the experience the user has in discovering and purchasing can be considered part of the product the brand provides.

The Internet has enabled mass customisation. For example, Nike (nikeid.nike.com) and Converse (www.converse.com) allow customers to customise their own trainers. The Internet as a distribution medium also makes it possible for products such as software and music to be sold digitally.

2. Price

The prevalence of search engines and of shopping comparison websites, such as www.pricerunner.co.uk, www.pricecheck.co.za/ and www.nextag.com, makes it easy for customers to compare product prices across a number of retailers; this makes the Internet a market of near-perfect competition (Porter, 2008).

These stories then go on to build connections between people, ideas, brands and products. Communities of people follow truly great brands because they want to be part of their stories. Apple is a good example of a brand with a dedicated tribal following. People want their products; they want the world to know that they have an iPhone or a Macbook. This kind of tribal following spells success for any brand.

With price differentiation becoming a challenge, especially for smaller players in the market, businesses need to consider differentiating on value. Value is a combination of service, perceived benefits and price, where customers may be willing to pay a higher price for a better experience, or if they feel they are getting something more than just the product.

3. Placement (or distribution)

Product distribution and markets no longer have to be dictated by location. Simply by making their products visible online (for example, on a website or Facebook page), brands can reach a global market. The key is to reach and engage customers on the channels they are using – this is why choosing your digital tactics is vital. You want to engage customers on their terms, not yours.

Technology such as APIs, SOAP services, RSS and XML allow information and services to be distributed throughout the world. For example, the API for a hotel reservations database allows a diverse range of websites to offer instant online bookings for hotels in the inventory.

4. Promotion

The Internet, as an information and entertainment medium, naturally lends itself to promoting products. The online promotional mix is an extension of the offline, but with some significant differences. For one, online promotion can be tracked, measured and targeted in a far more sophisticated way.

But promotion doesn't just mean advertising and talking at customers – on the Internet, it's crucial to engage, collaborate and join conversations, too. Interacting with customers helps build relationships, and the web makes this sort of communication easy. That's why a good portion of this book is devoted to engagement tactics and tools.

5. A new P: People

In addition to the existing Four Ps, the Internet requires you to consider a new P: People. This element speaks to examining the powerful human element that the digitally connected world permits: personalisation, peer-to-peer sharing, communities, and consumer-centric organisations that allow people to participate in the brand story.

NOTE

The 4Ps have been expanded by various academics to include many different concepts. The core ideas remain - how are you positioning the essential components of your offering to own space in the minds of your audience?

The Cluetrain Manifesto (1999) describes markets as ‘conversations’. Humans are storytellers; brands create stories, myths and legends around their products and services. Ultimately, what people say about your product or service is a story and now, more than ever, consumers are helping to craft the stories that define organisations.

2.6.3 SWOT analysis

A SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis is an ideal way to understand your business and your market.

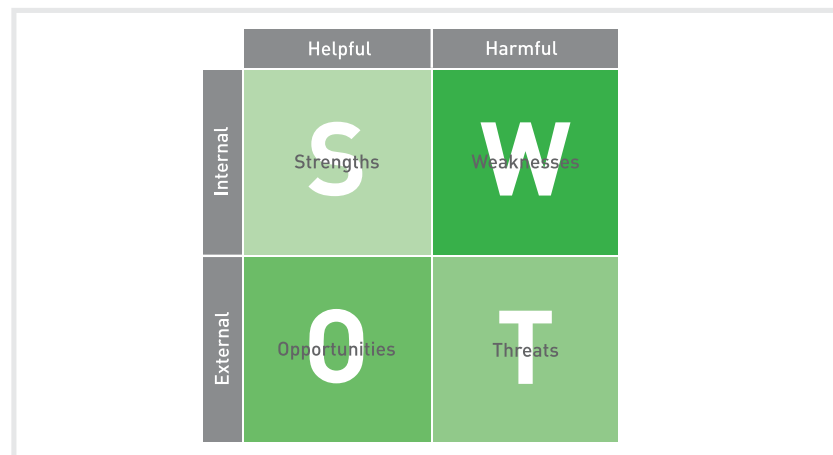


Figure 4. SWOT analysis.

Always have a purpose in mind when conducting a SWOT analysis. For example, study the external threats to your business, and see how learning from these can help you overcome internal weaknesses. This should tie back in to your business and marketing objectives – strengths should be promoted, opportunities should be sought out, while threats and weaknesses should be minimised as much as possible. A SWOT analysis is part of a situational analysis and identifies the key issues that direct the marketing strategy.

2.7 Crafting a digital marketing strategy

Any activity with an end goal (whether it’s winning a war, building a city or selling a product) should have a blueprint in place for every person in the organisation to

follow. In digital marketing, however, there is no single definitive approach – each business must create its own roadmap. However, there are questions you can use to guide the process.

A strategy needs to cover the questions of who you are, what you are offering and to whom, as well as why and how you are doing so. The steps and questions below cover what an organisation should be aware of when creating and implementing a strategy that will meet its marketing objectives and solve its challenges.

1. Context

The first step in crafting a successful strategy is to examine the context of the organisation and the various stakeholders. We’ve covered this under marketing strategy earlier in this chapter, but it bears repeating:

- What is the context in which you are operating (PESTLE factors) and how is this likely to change in the future?
- Who are you, why does your brand matter and what makes your brand useful and valuable?
- Who are your customers, and what needs, wants and desires do they have?
- Who are your competitors? These may extend beyond organisations that compete with you on the basis of price and product and could also be competition in the form of abstracts such as time and mindshare.

NOTE

PESTLE is discussed in more detail earlier in this chapter.

Thorough market research will reveal the answers to these questions.

2. Value exchange

Once you have examined the market situation, the second step is an examination of your value proposition or promise: in other words, what unique value your organisation can add to that market. It is important to identify the supporting value-adds to the brand promise that are unique to the digital landscape. What extras, beyond the basic product or service, do you offer to customers?

The Internet offers many channels for value creation. However, the definition of what is ‘valuable’ depends largely on the target audience, so it is crucial to research your users and gather insights into what they want and need.

Content marketing is the process of conceptualising and creating this sort of content – examples of value-based content include a DIY gardening video for a hardware brand, a research paper for a business analyst, or a funny infographic for a marketing company.

3. Objectives

When setting your digital marketing goals, there are four key aspects to consider: objectives, tactics, key performance indicators (KPIs) and targets. Let's look at each one in turn.

> Objectives

Objectives are essential to any marketing endeavour – without them, your strategy would have no direction and no end goal or win conditions. It's important to be able to take a step back and ask, 'Why are we doing any of this? What goal, purpose or outcome are we looking for?'

- **What are you trying to achieve?**
- **How will you know if you are successful?**

Objectives need to be SMART:

- **Specific** – the objective must be clear and detailed, rather than vague and general.
- **Measurable** – the objective must be measurable so that you can gauge whether you are attaining the desired outcome.
- **Attainable** – the objective must be something that is possible for your brand to achieve, based on available resources.
- **Realistic** – the objective must also be sensible and based on data and trends; don't exaggerate or overestimate what can be achieved.
- **Time-bound** – finally, the objective must be linked to a specific timeframe.

> Tactics

Objectives are not the same as tactics. Tactics are the specific tools or approaches you will use to meet your objectives – for example, a retention-based email newsletter, a Facebook page, or a CRM implementation. As a strategy becomes more complex, you may have multiple tactics working together to try to achieve the same objective. Tactics may change (and often should), but the objective should remain your focus. We'll look at tactics in more detail in the next section.

> Key performance indicators (KPIs)

KPIs are the specific metrics or pieces of data that you will look at to determine whether your tactics are performing well and meeting your objectives. For example, a gardener may look at the growth rate, colour and general appearance of a plant to evaluate whether it is healthy. In the same way, a marketer will look at a range of data points to determine whether a chosen tactic is delivering. KPIs are determined per tactic, with an eye on the overall objective.

> Targets

Finally, targets are the specific values that are set for your KPIs to reach within a specific time period. Sportspeople need to reach targets to advance their careers – for example, come in the top ten to qualify for the final, or run 10km in under 27 minutes. If you meet or exceed a target, you are succeeding; if you don't reach it, you're falling behind on your objectives and you need to reconsider your approach (or your target).

Here is an example:

SMART objective:

- **Increase sales through the eCommerce platform by 10% within the next six months.**

Tactics:

- **Search advertising**
- **Facebook brand page**

KPIs per tactic:

- **Search advertising – number of search referrals, cost per click on the ads**
- **Facebook brand page – number of comments and shares on campaign-specific posts**

Targets per tactic:

- **Search advertising – 1 000 search referrals after the first month, with a 10% month-on-month increase after that**
- **Facebook brand page – 50 comments and 10 shares on campaign-specific posts per week**

4. Tactics and evaluation

Many digital tools and tactics are available once you have defined your digital marketing objectives. Each tactic has its strengths – for example, acquisition (gaining new customers) may best be driven by search advertising, while email is one of the most effective tools for selling more products to existing customers.

The table below expands on some of the most popular tactics available to digital marketers and their possible outcomes. These will be covered in far more detail in the **Engage** section of this book.

Tactic	Outcome
SEO	Customer retention and acquisition
This is the practice of optimising a website to rank higher on the search engine results pages for relevant search terms. SEO involves creating relevant, fresh and user-friendly content that search engines index and serve when people enter a search term that is relevant to your product or service.	SEO has a key role to play in acquisition, as it ensures your organisation's offering will appear in the search results, allowing you to reach potential customers. A site that is optimised for search engines is also a site that is clear, relevant and well designed. These elements ensure a great user experience, meaning that SEO also plays a role in retention.
Search advertising	Sales, customer retention and acquisition
In pay-per-click or search advertising, the advertiser pays only when someone clicks on their ad. The ads appear on search engine results pages.	The beauty of search advertising is that it is keyword based. This means an ad will come up in response to the search terms entered by the consumer. It therefore plays a role in sales, acquisition and retention. It allows the advertiser to reach people who are already in the buying cycle or are expressing interest in what they have to offer.
Online advertising	Branding and acquisition
Online advertising covers advertising in all areas of the Internet – ads in emails, ads on social networks and mobile devices, and display ads on normal websites.	The main objective of display advertising is to raise brand awareness online. It can also be more interactive and therefore less disruptive than traditional or static online advertising, as users can choose to engage with the ad or not. Online advertising can be targeted to physical locations, subject areas, past user behaviours, and much more.
Affiliate marketing	Sales and branding
Affiliate marketing is a system of reward whereby referrers are given a 'finder's fee' for every referral they give.	Online affiliate marketing is widely used to promote eCommerce websites, with the referrers being rewarded for every visitor, subscriber or customer provided through their efforts. It is a useful tactic for brand building and acquisition.

Video marketing	Branding, customer retention and value creation
Video marketing involves creating video content. This can either be outright video advertising, or can be valuable, useful, content marketing.	Since it is so interactive and engaging, video marketing is excellent for capturing and retaining customer attention. Done correctly, it provides tangible value – in the form of information, entertainment or inspiration – and boosts a brand's image in the eyes of the public.
Social media	Branding, value creation and participation
Social media, also known as consumer-generated media, is media (in the form of text, visuals and audio) created to be shared. It has changed the face of marketing by allowing collaboration and connection in a way that no other channel has been able to offer.	From a strategic perspective, social media is useful for brand building, raising awareness of the brand story and allowing the consumer to become involved in the story through collaboration. Social media platforms also play a role in building awareness, due to their shareable, viral nature. They can also provide crowdsourced feedback and allow brands to share valuable content directly with their fans.
Email marketing	Customer retention and value creation
Email marketing is a form of direct marketing that delivers commercial and content-based messages to an audience. It is extremely cost effective, highly targeted, customisable on a mass scale and completely measurable – all of which make it one of the most powerful digital marketing tactics.	Email marketing is a tool for building relationships with potential and existing customers through valuable content and promotional messages. It should maximise the retention and value of these customers, ultimately leading to greater profitability for the organisation as a whole. A targeted, segmented email database means that a brand can direct messages at certain sectors of their customer base in order to achieve the best results.

Once the objectives and tactics have been set, these should be cross-checked and re-evaluated against the needs and resources of your organisation to make sure your strategy is on the right track and no opportunities are being overlooked.

5. Ongoing optimisation

It is increasingly important for brands to be dynamic, flexible and agile when marketing online. New tactics and platforms emerge every week, customer behaviours change over time, and people's needs and wants from brand evolve as their relationship grows. The challenge is to break through the online clutter to connect with customers in an original and meaningful way.

This process of constant change should be considered in the early stages of strategy formulation, allowing tactics and strategies to be modified and optimised as you go. After all, digital marketing strategy should be iterative, innovative and open to evolution.

Understanding user experience and the user journey is vital to building successful brands. Budget should be set aside upfront for analysing user data and optimising conversion paths.

Social thinking and socially informed innovation are also valuable and uniquely suited to the online space. Socially powered insight can be used to inform strategic decisions in the organisation, from product roadmaps to service plans. Brands have moved away from being merely present in social media towards actively using it, aligning it with actionable objectives and their corresponding metrics. This is critical in demonstrating ROI and understating the opportunities and threats in the market.

Managing the learning loop (the knowledge gained from reviewing the performance of your tactics, which can then be fed back into the strategy) can be difficult. This is because brand cycles often move more slowly than the real-time results you will see online. It is therefore important to find a way to work agility into the strategy, allowing you to be quick, creative and proactive, as opposed to slow, predictable and reactive.

2.8 Case study: Nike digital strategy

2.8.1 One-line summary

Nike transformed its marketing strategy by embracing key digital strategies such as data analytics, social engagement and storytelling.

2.8.2 The problem

As one of the biggest sports brands in the world, Nike was not struggling for exposure or attention. However, the brand was noticing that its traditional, big-budget advertising strategy was seeing fewer returns over time.

The biggest market for Nike products consists of young people between the ages of 15 and 25, who spend 20% more with Nike than any other group. But these Generation Y customers weren't paying attention to big, top-down media, and were looking for a brand that offered constant change and innovation, not just the same old thing over and over.

Nike realised that it needed a new approach to reach this digital audience.

2.8.3 The solution

Understanding that marketing in the digital age is a conversation, not a monologue, Nike dropped its spending on TV and print advertising by 40% between 2010 and 2012 – but increased its overall marketing budget to \$2.4 billion in 2012.

Nike chose to use a combination of technological innovations, data analytics and social media engagement to reach this new, digitally savvy audience.

Engineers and scientists associated with prestigious organisations such as MIT and Apple were hired to build exciting new technologies and examine market insights. One of their biggest accomplishments was the creation of Nike+ in 2010 – a device that lets users track their exercise regimens, upload these to the web, monitor their progress, and share their achievements socially. The product range grew to include the Nike FuelBand.

This new community created incredible volumes of data, which Nike used to track behaviours, create online communities and spaces for Nike fans, and build meaningful relationships between the brand and its customers. Nike moved its social media marketing team in-house so that it had a closer connection to this data and the conversations being generated by its fans.

Nike also embraced a range of other digital best practices:

- **A strong focus on storytelling:** Nike advertising shifted from delivering one core 'big message' about its products to talking about inspiration, aspirations and overcoming odds. For example, Nike's 'I Would Run To You' ad (essentially a funny short film) shows the story of a long-distance couple reconnecting by running across the country to see each other.
- **Being an authentic brand:** The storytelling approach creates authenticity and a sense of community. Nike also strives to understand and engage with the subcultures of each sport, talking to them in the vernacular they are familiar with.
- **Understanding and communicating with customers on their terms:** When Nike created its big-budget 'Write The Future' ad for the 2012 World Cup, featuring soccer superstars Wayne Rooney and Cristiano Ronaldo, it flighted the ad on Facebook and YouTube rather than on TV. Having seeded to a community and primed it with teasers, the ad received 8 million views in the first week and went viral.
- **Being remarkable and shareable:** Nike put up a 30-storey digital billboard in Johannesburg, South Africa that was populated with constantly-updating user tweets, creating a buzz around the campaign.
- **Allowing mass customisation:** The Nike iD online store lets fans create their own custom shoe designs and have them shipped. The concept earned Nike over \$100 million in its first year.

2.8.4 The results

Nike's new approach – harnessing data for user insight and creating a diverse, social and engaged digital strategy – has had excellent results.

Nike reaches over 200 million fans every day in an interactive dialogue, rather than having to rely on big sponsored events such as the Super Bowl or World Cup to reach this number.

The massive volumes of freely shared user data produce meaningful brand insights, lead to product innovations, and allow the brand to get closer to consumers.

In addition to this:

- Nike share prices rose by 120% between 2010 and 2012 – an important consideration, since every business aims to make money, after all.
- Nike+ experienced a 55% growth in membership in 2012 – as of June 2012, 7 million users have signed up for the service, and the majority of these connect with the brand several times each week to upload and review their exercise data.
- As of August 2013, the main Nike Facebook page has over 15 million likes, the Nike Football page has 19.4 million likes, and the Nike Basketball page has over 5 million – posts typically see a high level of interaction and discussion.
- Similarly, on Twitter, the brand is also engaging millions of fans – 1.7 million on the core Nike account, 1.2 million on the brand's US-based Nike.com store account, and 1.4 million on the Nike Football account.

2.9 The bigger picture

All of the chapters in this book are linked to digital marketing strategy in one way or another.

A solid business and brand strategy should be the starting point of any marketing venture, and you should always keep one eye on it as you develop specific campaigns, platforms and approaches. After all, you should always remember that you are trying to reach your chosen audience by communicating to them in the most effective way, to build lucrative long-term relationships.

While strategy helps you understand the questions you should ask, market research is the process used to answer them. From there, content marketing strategy helps you put your ideas into practice, creating materials that engage, enthrall, convert and retain customers.

2.10 Summary

Strategy is the essential first step in positioning your brand within the market and creating a roadmap for achieving your business goals. While there are many different paths one can take, there is a clear process for understanding where you are, where you need to be, and how you will get there.

It all starts with understanding the business challenges that your brand faces. From here, an effective marketing strategy looks at the market context, weighs the available options and makes important choices, based on solid research and data. Digital marketing strategy adds a layer of technology, engagement and iterative optimisation into the mix. The wide variety of tools and tactics offered by the digital medium should inform your strategic choices.

Digital marketing strategy is highly empirical and your strategic thinking should be mindful of ROI and how it can be measured. This will allow you to optimise your tactics and performance in order to create a valuable brand story, an excellent user experience, the most optimised conversion funnels, and the highest ROI.

2.11 Case study questions

1. What was the key insight that helped Nike develop a holistic marketing strategy?
2. What role do you think offline marketing and branding channels played in furthering the digital strategy?
3. What should Nike take into consideration when rolling out new elements and campaigns as part of their marketing strategy?

2.12 Chapter questions

1. Why is it important to consider the business context when planning your marketing strategy?
2. How has the Internet affected marketing and the models we use to understand it?
3. Do you agree with the idea that customers are more empowered than they were before digital communications were so prevalent? Motivate your answer.

2.13 Further reading

www.sethgodin.typepad.com – Seth Godin's popular blog provides regular insight and food for thought.

smithery.co – A marketing and innovation blog that teaches marketers to 'Make Things People Want, rather than spend all their energy and resources trying to Make People Want Things'.

www.gigaom.com – GigaOM's community of writers covers a wide range of technological topics.

www.adverblog.com – A digital marketing blog that collates ideas from marketing campaigns around the world.

www.baekdal.com – Thomas Baekdal's articles provide perspectives and models of how the Internet is changing marketing.

Positioning: The Battle for Your Mind – This book by Ries & Trout published in 2002 offers excellent advice claiming space in the minds of consumers.

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03

Market
Research

What's inside: We begin with an **introduction**, and then it's into the **key terms and concepts** of market research, **quantitative and qualitative research**, how to go about **gathering data**, and the distinction between **primary** and **secondary research**. Learn about **online research communities**, conducting **research surveys** and get to grips with the valuable **tools of the trade**. Wrap things up with a **chapter summary** and a **case study** showing how BrandsEye has developed with the market's demands.

3.1 Introduction

The Internet is built for research. Whether it's a consumer shopping around for prices, a researcher exploring a topic or a fan looking up their favourite band, the Internet makes finding and analysing information easier than ever before. That's because everything people do online leaves a data footprint.

Consumers are able to research companies and products easily, gathering information to compare prices and services with a few clicks of the mouse. Consumers are also able to share likes and dislikes easily, whether that information is shared with companies or with friends.

This process can also work in reverse: brands can study who their customers are, what they are interested in, how they feel about the brand, and the best times and places to engage with them. This is what online market research is all about.

In this chapter, you will learn:

- Why online market research is crucial to any marketing endeavour
- The most important concepts you need to know in order to start conducting research
- Several methods for conducting online research, including surveys, online focus groups and online monitoring
- What problems and pitfalls to avoid when researching online

3.2 Key terms and concepts

Term	Definition
Bounce rate	The number of people who view one page and then leave a website without viewing any other pages.
Data	Statistics and facts collected for analysis.
Focus group	A form of qualitative research where people are asked questions in an interactive group setting. From a marketing perspective, it is an important tool for acquiring feedback regarding new products and various topics.
Hypothesis	A supposition that is tested in relation to known facts; a proposition based on reason but not necessarily assumed to be true.
Listening lab	A testing environment where the researcher observes how a customer uses a website or product.

Observation/online ethnography	When a researcher immerses themselves in a particular environment in order to gather insights.
ORM	Online reputation management (ORM) Understanding and influencing the perception of an entity online.
Primary research	The collection of data to present a new set of findings from original research.
Qualitative data	Data that can be observed but not measured. Deals with descriptions.
Quantitative data	Data that can be measured or defined. Deals with numbers.
Really simple syndication (RSS)	RSS allows you to receive updates without requiring you to constantly visit web pages in your browser.
Research community	A community set up with the intention of being a source for research.
Research methodology	Methods employed in research for reaching results.
Sample size	The number of respondents in a sample of the population.
Secondary research	The collection of existing research data.
Sentiment	The emotion attached to a particular mention – positive, negative or neutral.
Statistically significant	A sample that is big enough to represent valid conclusions.

3.3 The importance of market research

The modern world is unpredictable, and things change very quickly in the digital age. It is becoming increasingly more difficult to keep up with trends, customer needs, popular opinions and competitors – and at the same time, staying at the forefront of the market is vital to success.

So, how can you keep your brand current and ensure you are meeting your customers' needs?

The answer is to conduct market research. Market research helps you make informed business decisions. It involves systematically gathering, recording and analysing data about customers, competitors and the market, and turning this data into insight that can drive marketing strategies and campaigns.

Online market research is the process of using digital tools, data and connections to glean valuable insights about a brand's target audience. In other words, it's the process of learning about your audience by engaging and observing them

online. Technology plays a key role in gathering data and connecting with research participants, and makes the whole process quicker and easier to manage than traditional offline research methods.

Traditional and online market research have the same goals and underlying principles, but online market research has the benefit of using digital technology, which provides a range of benefits:

- The Internet is always on, meaning that data are readily available at any time.
- Many of the processes for finding, gathering and storing data can be automated (for example, you can get an automatic email alert if someone mentions your brand, or you can set up self-administered digital surveys).
- You have access to a large number of participants around the world at the click of a button.
- A lot of the information you will use is already being automatically collected (such as web analytics and social media data) – all you need to do is access it.
- People are often happy to share their own research, insights and methodologies online, so you can access this trove of resources to inform your own research.
- Online market research can be much more cost effective and quick to set up than traditional research techniques.

There are many reasons why you should conduct regular market research:

- Gain insights into your consumers – this can include:
 - o What customers want and need from your brand
 - o What customers like and dislike about the brand
 - o Why customers buy the brand's products or services
 - o Why potential customers might choose your brand over another one
 - o Why (or why not) customers make repeat purchases
- Understand the changes in your industry and business
- Discover new market trends on which you can capitalise
- Find new potential sales avenues, customers, products and more
- Find and engage new audiences
- Allow customers to help steer your business

If you are able to understand your customers and the greater business context, you will be able to market more effectively to them, meet their needs better, and drive more positive sentiment of your brand. All of this adds up to happier customers and, ultimately, a healthier bottom line.

3.4 Key concepts in market research

While the research field can be full of complex terminology, there are four key concepts you should understand before conducting your own research:

- Research methodology
- Qualitative and quantitative data
- Primary and secondary research
- Sampling

3.4.1 Research methodology

A research methodology is the process you should follow in order to conduct accurate and valuable research. Research should involve certain steps:

1. Establish the goals of the project
2. Determine your sample
3. Choose a data collection method
4. Collect data
5. Analyse the results
6. Formulate conclusions and actionable insights (for example, producing reports)

Most often, market research is focused around specific issues unique to a business or brand. It is therefore not always possible to get hold of comparable information to aid decision making. This is why it can be useful to start from a specific research problem or hypothesis.

Your research question should guide your entire process, and will determine your choice of data collection method (more on those later).

NOTE

Remember that comments made on social networks cannot represent the views of your entire target market. The validity of any data must be considered in light of your research design.

3.4.2 Primary and secondary research

Research can be based on **primary data** or **secondary data**. Primary research is conducted when new data is gathered for a particular product or hypothesis. This is where information does not exist already or is not accessible, and therefore needs to be specifically collected from consumers or businesses. Surveys, focus groups, research panels and research communities can all be used when conducting primary market research.

Secondary research uses existing, published data as a source of information. It can be more cost effective than conducting primary research. The Internet opens up a wealth of resources for conducting this research. The data would, however, originally have been collected for solving problems other than the one at hand, so they may not be sufficiently specific. Secondary research can be useful in identifying problems to be investigated through primary research.

The Internet is a useful tool when conducting both primary and secondary research. Not only are there a number of free tools available when it comes to calculating things such as sample size and confidence levels (see the section on Tools of the trade for some examples), but it is also an ideal medium to reach large numbers of people at a relatively low cost.

The Internet and secondary research

Research based on secondary data should precede primary data research. It should be used in establishing the context and parameters for primary research:

- The data can provide enough information to solve the problem at hand, thereby negating the need for further research.
- Secondary data can provide sources for hypotheses that can be explored through primary research.
- Sifting through secondary data is a necessary precursor for primary research, as it can provide information relevant to sample sizes and audience, for example.
- The data can be used as a reference base to measure the accuracy of primary research.

Companies with online properties have access to a wealth of web analytics data that are recorded digitally. These data can then be mined for insights. It's worth remembering, though, that it's usually impossible for you to access the web analytics data of competitors – so this method will give you information only about your own customers.

Customer communications are also a source of data that can be used, particularly communications with the customer service department. Committed customers who complain, comment or compliment are providing information that can form the foundation for researching customer satisfaction.

Social networks, blogs and other forms of social media have emerged as forums where consumers discuss their likes and dislikes, and can be particularly vocal about companies and products. These data can, and should, be tracked and monitored to establish consumer sentiment. If a community is established for research purposes, these should be considered primary data, but using social media to research existing sentiments is considered secondary research.

The Internet is an ideal starting point for conducting secondary research based on published data and findings. But with so much information out there, it can be a daunting task to find reliable resources.

The first point of call for research online is usually a search engine, such as www.google.com or www.yahoo.com. Search engines usually have an array of advanced features, which can aid online research. For example, Google offers:

- Advanced search (http://www.google.co.za/advanced_search?hl=en)
- Google Scholar (<http://scholar.google.co.za/schhp?hl=en>)
- Google Book Search (<http://www.google.co.za/books?hl=en>)
- Google News Archive (<http://news.google.com/newspapers>)

Many research publications are available online, some for free and some at a cost. Many of the top research companies feature analyst blogs, which provide some industry data and analysis free of charge.

Some notable resources are:

- www.e-consultancy.com
- www.experian.com/hitwise
- www.pewinternet.org (US data)
- www.nielsen.com
- www.worldwideworx.com (SA data)

The Internet and primary research

Primary research involves gathering data for a specific research task. It is based on data that has not been gathered beforehand. Primary research can be either qualitative or quantitative.

Primary research can be used to explore a market and can help to develop the hypotheses or research questions that must be answered by further research. Generally, qualitative data is gathered at this stage. For example, online research communities can be used to identify consumer needs that are not being met and to brainstorm possible solutions. Further quantitative research can investigate what proportion of consumers share these problems and which potential solutions best meet those needs.

NOTE

With larger sample sizes, qualitative data may be analysed quantitatively.

3.4.3 Quantitative and qualitative data

Data can be classified as **qualitative** or **quantitative**. Qualitative research is exploratory and seeks to find out what potential consumers think and feel about a given subject. Qualitative research aids in identifying potential hypotheses, whereas quantitative research puts hard numbers behind these hypotheses. Quantitative research relies on numerical data to demonstrate statistically significant outcomes.

The Internet can be used to gather both qualitative and quantitative data. In fact, the communities on the web can be viewed as large focus groups, regularly and willingly sharing their opinions on products, markets and companies.

When both qualitative and quantitative research are used, qualitative research usually takes place first to get an idea of the issues to be aware of, and then quantitative research tests the theories put forward.

The main differences between quantitative and qualitative research are represented in the following table.

	Quantitative	Qualitative
Data gathered	Numbers, figures, statistics, objective data	Opinions, feelings, motivations, subjective data
Question answered	What?	Why?
Group size	Large	Small
Data sources	Surveys, web analytics data	Focus groups, social media

	Quantitative	Qualitative
Purpose	Tests known issues or hypotheses. Seeks consensus, the norm Generalises data	Generates ideas and concepts – leads to issues or hypotheses to be tested. Seeks complexity Puts data in context
Advantages	Statistically reliable results to determine if one option is better than the alternatives.	Looks at the context of issues and aims to understand perspectives.
Challenges	Issues can be measured only if they are known prior to starting. Sample size must be sufficient for predicting the population	Shouldn't be used to evaluate pre-existing ideas. Results are not predictors of the population.

Both quantitative and qualitative research can be conducted online.

Web analytics packages are a prime source of data. Using data such as search terms, referral URLs and internal search data can lead to qualitative information about the consumers visiting a website. However, when data is measurable and specific, such as impressions and clickthrough rates, it leads to quantitative research.

NOTE

Read more about this in the *Data Analytics* chapter.

3.4.4 Sampling

Qualitative research is usually conducted with a small number of respondents in order to explore and generate ideas and concepts. Quantitative research is conducted with far larger numbers, enough to be able to predict how the total population would respond.

Sample size is an important factor in conducting research and should be representative of the population you are targeting as a whole. If your business transacts both online and offline, be aware that using only online channels for market research might not represent your true target market. However, if your business transacts only online, offline channels for your market research are less necessary.

Because quantitative research aims to produce predictors for the total population, sample size is very important. The sample size needs to be sufficient in order to make statistically accurate observations about the population.

For example, if you have 4 000 registered users of your website, you don't need to survey all of them in order to understand how the entire population behaves. You need to survey only 351 users to get a sample size that gives you a 95% confidence level with a $\pm 5\%$ confidence interval. This means that you can be 95% sure your results are accurate within $\pm 5\%$.

There are several sample size calculators mentioned in the section on Tools of the trade.

NOTE

Who would you select to participate in an online focus group? How do you think the demographic of your participants affect the resulting data?

3.5 Online research methodologies

There are many online market research methodologies. This chapter touches on three of the most popular and useful ones: surveys, online focus groups and social media monitoring.

Which methodology should you choose?

That all depends on a variety of factors, from your research question and purpose to your budget and time. Here are some general pointers:

- **Surveys:** Ideal for collecting large amounts of quantitative data (and some qualitative data, too) – they are quick and easy to set up, and can run automatically.
- **Online focus groups:** Ideal for engaging consumers and collecting qualitative data such as opinions, ideas and feelings about the brand – they require a larger time investment and a willing group of participants.
- **Online monitoring:** Ideal for collecting qualitative data on brand sentiment, and can also provide some quantitative data around volume of interest in the brand – these data can be collected passively, and there are several tools that can automate this.

3.5.1 Surveys

Surveys are questionnaires that contain a series of questions around a specific topic. Their purpose is to gather large volumes of quantitative data easily, though they can also collect some qualitative data.

Conducting surveys online allows for data to be captured immediately, and data analysis can be performed easily and quickly. By using email or the Internet for conducting surveys, geographical limitations for collecting data can be overcome cost effectively.

Technology allows you to compile sophisticated and user-friendly surveys. For example, as opposed to indicating impressions on a sliding scale, respondents can indicate emotional response. Or the survey can be tailored depending on previous answers (such as questions being skipped if they are not relevant to the respondent).

You can run ongoing online surveys at minimal cost. Simple polls can be used in forums and on blogs to generate regular feedback. Website satisfaction surveys are also an easy way to determine the effectiveness of a website or marketing campaign.

A growing survey trend is getting instant feedback on questions or ideas from an existing community (such as a trusted group of thought leaders, your brand's social media fans, or a pre-created research community). Examples include the many Facebook polling apps and real-time mobile survey platforms such as InstantAfrica (www.instantafrica.com).

Designing surveys

How you design a survey and its questions will directly impact on your success. A survey can include any number and type of questions, and more complicated questions should appear only once users are comfortable with the survey.

Be careful that you do not introduce bias when creating questions by asking leading questions.

Example:

Incorrect: We have recently introduced new features on the website to become a first class web destination. What are your thoughts on the new site?

Replace with: What are your thoughts on the changes to the website?

In general, you will also find that you get more accurate answers when phrasing questions in the past tense than in the continuous tense.

Example:

Incorrect: How many times a week do you buy take-away food?

Replace with: In the past month, how many times did you buy take-away food?

Questions in the survey should be brief, easy to understand and easy to answer.

Types of survey questions

1. Open-ended

Open-ended questions allow respondents to answer in their own words. This usually results in qualitative data.

Example:

What features would you like to see on the website for the digital marketing textbook (www.quirk.biz/digital-marketing-textbook)?

2. Closed

These questions give respondents specific responses from which to choose. These are typically multiple-choice questions with either one or multiple possible answers. This results in quantitative data.

Example:

Do you use the digital marketing textbook website?

- Yes
- No

or:

What features of the digital marketing textbook website do you use? Tick all that apply.

- Blog
- Case studies
- Free downloads
- Additional resources

3. Ranked or ordinal

These questions ask respondents to rank items in order of preference or relevance. Respondents are given a numeric scale to indicate order. This results in quantitative data.

Example:

Rate the features of the digital marketing textbook website, where 1 is the most useful and 4 is the least useful.

- Blog
- Case studies
- Free downloads
- Additional resources

4. Matrix and rating

These types of questions can be used to quantify qualitative data. Respondents are asked to rank behaviour or attitude.

Example:

Rate the features of the digital marketing textbook website according to the following scale:

1 = love it, 2 = like it, 3 = no opinion, 4 = dislike it.

- Blog
- Case studies
- Free downloads
- Additional resources

3.5.2 Focus groups

Online focus groups involve respondents gathering online and reacting to a particular topic. Respondents can be sourced from all over the world and react in real time, arguably being freer with their responses since they can be anonymous in an electronic environment.

Online focus groups are ideal for having frank, detailed conversations with people who have an interest in your brand – this means they result in primary, qualitative data. This information can then be used to create quantitative research questions.

Online focus groups can be conducted by using a range of technologies. The simplest is to use a text-based messaging program or online forum – there are many options available. More sophisticated tools allow for voice or video conferencing, and can make it easier for the researcher to pick up clues from the respondent's voice and facial expressions. Some tools allow the researcher to share their desktop screen with respondents in order to illustrate a concept or question.

Good options for conducting online focus groups include:

- Google Hangouts: www.google.com/+learnmore/hangouts
- Skype: www.skype.com/en
- GoToMeeting: www.gotomeeting.com/fec



Figure 1. An example of a Google hangout in progress. (Source: Brand Graphics, 2013)

Focus groups are less formal than surveys: the researcher will have specific questions to ask, but the conversation usually grows and develops organically as

participants discuss their impressions. Usually running for between one and two hours, focus groups are used to get consumer views on:

- New products or marketing campaigns
- Existing products and campaigns, and how they can be improved
- Sentiment around the brand
- Views on a brand's new direction or visual style
- Ideas for how the brand could improve its position or branding.

Online focus groups are excellent for collecting a lot of qualitative data quickly. When setting up the group, try to include enough participants to keep the conversation alive, but not too many so that some get drowned out by others – eight to ten is a good range. Also consider that you may run into technical troubles if people are connecting from different locations and Internet connections – be prepared to do some basic troubleshooting if this happens.

There are a number of different ways that you can recruit participants for an online focus group. This could include inviting people from your existing customer database, going through a traditional market research recruiting agent, or putting a call out on your website or social media communities. It is common practice to offer a small incentive to people who participate in a focus group, as it is a fairly time-intensive activity.

3.5.3 Online monitoring

Finding out if people are talking about you is quite difficult in the offline world, but almost effortless online. Rather than having to conduct real-world surveys and interviews, in the digital world you can simply 'listen' to the conversation happening about you.

Keywords – the foundation to categorising and indexing the web – make it simple to track conversations taking place online. Customers don't always use channels designated by a company to talk about that organisation, but the good news is that the Internet makes it easy for a company to identify and use the channels that customers have selected.

Online tools allow a company to track mentions of itself, its staff, its products, its industry and its competitors – or anything else that is relevant. This is called online monitoring or online listening – you are simply using digital tools to find and tap in to existing conversations. The tool then gathers and collates all the mentions it finds, so that you can analyse the data for insights.

NOTE

Online reputation management involves much more than just handling a PR crisis. Online monitoring can supply your business with insight into the reception of many different business functions.

Typically, searches include the following main focus areas:

- Company
- Brand name
- Key products
- Key personnel (names, job titles, etc.)
- Key campaigns and activities
- Industry
- Conferences
- Patents
- News
- Competitors
- Brand names
- Product launches
- Website updates
- Job vacancies
- Key people

There are four different types of searches you can perform to track relevant brand keywords. Each modifies the specific type of data collected and aims to improve the quality and depth of the data you gather.

The four operators are:

- **Broad match** – e.g. Apple Computers. This is when any of or all words must be found in the mention.
- **Direct match** – e.g. "Apple Computers". This is denoted by quotation marks and dictates that the tool should find mentions only where the phrase appears complete and in order in the content.
- **Inclusive match** – e.g. Apple +computers. This is denoted by a plus sign directly before a word or phrase. This will direct the tool to search for any mention that contains both Apple AND computers, although not necessarily in that order.
- **Exclusive match** – e.g. Apple -fruit. This is denoted by a minus sign directly before a word or phrase. This will instruct the tool to include only mentions that contain the first word or phrase but not when the second word is also in the same mention.

Combinations of these four types of searches (operators) can be used to improve accuracy.

- For example: "Apple Computers" + "steve jobs" -fruit.

Applying this theory to the groupings above, some keywords used for Apple might be:

Company

- "Apple computers"
- "www.apple.com"
- Apple +Macbook, "iPod nano", "Macbook Air", "iTunes" +music -radio
- "Steve Jobs"

Industry

- "Consumer Electronics Show" + "Las Vegas"
- "CEBIT"

Competitors

- Microsoft
- www.microsoft.com

It is also important to track common misspellings, all related companies and all related websites.

Tracking the names of people key to a company can highlight potential brand attacks, or can demonstrate new areas of outreach for a company.

Brand names, employee names, product names and even competitor names are not unique. To save yourself from monitoring too much, identify keywords that will indicate that a post has nothing to do with your company, and exclude those in your searches.

For example, "apple" could refer to a consumer electronics company, or it could appear in a post about the health benefits of fruit. Finding keywords that will indicate context can help to save time. So, you could exclusive-match words such as "fruit", "tasty" and "granny smith".

Tools for online monitoring

Thankfully, online listening does not entail hourly searches on your favourite search engine to see what conversations are taking place online. There are many different tools that monitor the web, and supply the results via email alerts or RSS feeds or a web dashboard.

Google has several bespoke search services, and periodically adds more to the list. With the services below, an RSS feed is available for the search (Google Alerts sends weekly or daily emails with updates), so that all updates can be available through a feed reader.

NOTE

Free tools like those listed here can be very useful, if somewhat limited. For larger brands however, the investment in a paid tool is often worth it given the volume of conversation to be monitored.

- **Google Alerts:** www.google.com/alerts. Google Alerts will send an email when the keyword is used in either a credible news item or a blog post.
- **Google News:** news.google.com. Google News searches all news items for mentions of a keyword.
- **Google Blog Search:** blogsearch.google.com. Google Blog Search searches all blog posts for mentions of a keyword.
- **Google Patent Search:** www.google.com/patents. Google Patent Search allows you to keep track of all filings related to an industry, and searches can be done to see if there are patent filings which might infringe on other patents.
- **Google Video Search:** www.google.com/videohp. Video search relies on the data that have been added to describe a video, and will return results based on keyword matches.

There are several search engines that focus solely on tracking blogs, news and other social media, and can provide trends for searches. As well as providing regular updates of new postings, these search engines can also provide an overview over a certain period of time.

- **Technorati:** www.technorati.com. Technorati tracks blogs and tagged social media.
- **Socialbakers:** www.socialbakers.com. Socialbakers provides a series of social media listening options.
- **Flickr:** www.flickr.com/search. RSS updates for searches on a particular keyword will reveal when a brand name has been used in tagging a photo.
- **Delicious:** delicious.com. An RSS feed can be created for URLs tagged with keywords, or for new bookmarking of a URL.

In addition to these mostly free tools, there are also a number of premium paid tools available to make the process easier and more robust. See the section on Tools of the trade for more suggestions.

Listening is the first step to getting involved in the conversation surrounding a company. Using search tools and RSS feeds means that information can be

accessed quickly and in one place, without the need to visit hundreds of websites. Social media engagement is often the next step in keeping these customers engaged.

NOTE

Read more about this in the *Social Media Strategy* chapter.

3.5.4 Other avenues for online research

Personal interviews

There are various tools available to the online researcher for conducting personal interviews, such as private chat rooms or video calling. The Internet can connect a researcher with many people around the world and make it possible to conduct interviews with more anonymity, should respondents require it.

Observation/Online ethnography

Taking its cue from offline ethnography, online ethnography requires researchers to immerse themselves in a particular environment. In this way insights can be gathered that might not have been attainable from a direct interview. However, they do depend more heavily on the ethnographer's interpretation, and are therefore subjective.

Online research communities

Although online communities are a valuable resource for secondary research, communities can also provide primary data. General Motors' Fast Lane blog is an example of an online research community that helps gather research data. The blog can be used as a means to elicit feedback to a particular research problem. This is qualitative data that can aid the company in exploring their research problem further. In many cases, social media can be used to gather insight about a brand or customer experience. It is important to remember, however, that a representative sample is necessary for making solid conclusions.

Listening labs

When developing websites and online applications, usability testing is a vital process that will ensure the website or application is able to meet consumers' needs. Listening labs involve setting up a testing environment where a consumer is observed using a website or application.

Conversion optimisation

Conversion optimisation aims to determine the factors of an advert, website or web page that can be improved in order to convert customers more effectively. From search adverts to email subject lines and shopping cart design, tests can be set up to determine what variables are affecting the conversion rate.

NOTE

Read more about this in the *Conversion Optimisation* chapter.

The *Conversion Optimisation* chapter covers tools for running tests, such as A/B split testing and multivariate testing.

3.5.5 How to get responses: Incentives and assurances

As the researcher, you know what's in it for you when sending out a survey: you will receive valuable insights that will aid in making business decisions. But what is in it for the respondents?

According to Survey Monkey, the ways in which the surveys are administered play a role in response rates, and these can be relative:

Mail: 50% adequate, 60–70% good to very good

Phone: 80% good

Email: 40% average, 50–60% good to very good

Online: 30% average

Classroom pager: 50+% good

Face to face: 80–85% good

(University of Texas, 2011)

Response rates can be improved by offering respondents an incentive for participating in the research, such as a chance to win a grand prize, a discount or special offer for every respondent, or even the knowledge that they are improving a product or service that they care about.

Some researchers feel that monetary incentives are not always a good thing. Some respondents may feel that they need to give 'good' or 'correct' answers that may bias your results. Alternatively, you may attract respondents who are in it just for the reward. One approach could be to run the survey with no incentive, with the option of offering one if responses are limited.

Designing the survey to assure respondents of the minimal time commitment and their privacy can also help to increase responses.

3.5.6 Room for error

With all research, there is a given amount of error to deal with. Bias may arise during surveys and focus groups (for example, interviewers leading the respondents) or be present in the design and wording of the questions themselves. There could be sample errors or respondent errors. Using the Internet to administer surveys removes the bias that may arise from an interviewer. However, with no interviewer to explain questions, there is potential for greater respondent error. This is why survey design is so important, and why it is crucial to test and run pilots of the survey before going live.

Respondent errors also arise when respondents become too familiar with the survey process. The general industry standard is to limit respondents to being interviewed once every six months.

Sample error is a fact of market research. Some people are just not interested, nor will they ever be interested, in taking part in research. Are these people fundamentally different from those who do? Is there a way of finding out? To some extent, web analytics, which track the behaviour of all visitors to your website, can be useful in determining this.

When conducting online research, it is crucial to understand who is in the target market, and what the best way to reach that target market is. Web surveys can exclude groups of people due to access or ability. It is vital to determine if it is acceptable to the survey, and to use other means of capturing data if not.

3.6 Justifying the cost of research

Regular research is an important part of any business' growth strategy, but it can be tough to justify the budget necessary for research without knowing the benefit. Conducting research can cost little more than an employee's work hours, depending on his or her skills, or it can be an expensive exercise involving external experts. Deciding where your business needs are on the investment scale depends on the depth of the research required, and what the expected growth will be for the business. When embarking on a research initiative, the cost to benefit ratio should be determined.

Testing should be an ongoing feature of any digital marketing activity. Tracking is a characteristic of most digital marketing, which allows for constant testing of the most basic hypothesis: is this campaign successful in reaching the goals of the business?

NOTE

Understanding the limitations of your research design is crucial to delivering useful results. If decisions are to be made based on the data you supply, you must be sure that your findings are valid.

3.7 Tools of the trade

Creating and managing online surveys:

- SurveyMonkey: www.surveymonkey.com
- Wufoo: www.wufoo.com
- Kwik Surveys: kwiksurveys.com
- Google Forms: accessed through Google Drive drive.google.com
- Qualaroo Insights (unique real-time offering): qualaroo.com

Split test calculator:

- www.usereffect.com/split-test-calculator

Sample size calculator:

- www.rogerwimmer.com/mmr/samplesizecalculator.htm

Internet Usage World Stats:

- www.internetworldstats.com

Google Think

- www.google.com/think

Silverback usability testing software

- www.silverbackapp.com

Mobile-based survey tools:

- www.ponderingpanda.com (SA youth)
- www.instantafrica.com (SA)

Ideo Method Cards app (ideas for qualitative research):

- www.ideo.com/work/ideo-method-card-app

Premium Online Monitoring Tools:

- BrandsEye: <http://www.brandseye.com/>
- Salesforce Marketing Cloud: <http://www.salesforcemarketingcloud.com/>

3.8 Advantages and challenges

Market researchers are increasingly turning to online tools in their research processes. The Internet allows for research at a far lower cost; it can also more easily cross geographic boundaries and can speed up the research process.

This is not to say there are not downsides. While the Internet makes it possible to reach a far larger group of people without the cost of facilitators, this does come with some challenges. For example, you cannot control the environments in which information is being gathered. For an online sample, it's important to focus on getting the correct number of people to make your study statistically viable. If your questions are not carefully drafted, confusing questions could lead to answers that are flawed or not relevant. Additionally, online incentives could lead to answers that are not truthful, meaning that the value of the data could be questionable.

The value of Internet research should by no means be discounted, but it is important to consider the nature of the study carefully, and interrogate the validity and legitimacy of the data as a valid representation. Data is meaningful only if it is representative, so make sure to establish goals and realistic expectations for your research.

3.9 Rocking the Daisies – 2011 & 2012 – Case Study

3.9.1 One-line summary

The Rocking the Daisies music festival used online monitoring to measure return on investment (ROI) for sponsors and unearthed accurate insights to create a better festival experience.

3.9.2 The problem

Rocking the Daisies is a South African-born music festival that takes place every October in Darling in the Western Cape. For festival organisers, measuring the success of the event is crucial to the planning process for the next one. They ask questions such as: 'How do we prove that the event is increasing in popularity?', and 'How do we prove that this year's festival is more successful than last year's?'

The problem is that measurement of sponsored events is challenging, as attendees are often unwilling to interrupt their experience to respond to research questionnaires, and research conducted after the experience loses its impetus and accuracy.

3.9.3 The solution

Enter BrandsEye, an online monitoring tool that captures organic conversations in real time across multiple online platforms, offering insight for both organisers and sponsors. BrandsEye also offers a range of metrics used to track festival performance.

For two consecutive years, event organisers have used BrandsEye to track online conversation before, during and after the festival. As a result, they can understand the festival audience’s needs and preferences, garner insights in order to answer the most pressing questions around the festival’s success, identify new commercial opportunities, and assist in assessing ROI for sponsors.

For a festival this large, online conversation across social media, blogs, forums, press and various other platforms begins six months (or more) before the event. For the 2012 festival, BrandsEye began its tracking around May, and slowly watched the volumes of online conversation increase as the festival approached.

All data collected during the period was processed and displayed on BrandsEye’s customised measurement dashboards, which automatically updated in real time. Additionally, users could apply filters to explore the data and mine them for insights.

3.9.4 The results

This table outlines some of the metrics used to measure the Rocking the Daisies festival.

	2011	2012
Metric		
Volume of conversation	7 748	14 979
Opportunities to see	8 412 530	14 602 550
Advert Value Equivalent*	1 949 024	3 397 916
Sentiment		
Positive	25.7%	20.6%
Negative	9.8%	0.5%
Neutral	64.5%	79.2%

* The amount which would be spent on online advertising for the same exposure.

The overall sentiment towards the Rocking the Daisies festival in both years was overwhelmingly positive. Although the share of positive conversation didn’t increase in 2012, the percentage

in relation to the volume increase was still significant. Furthermore, the share of negative conversation in 2012 noticeably decreased, with a corresponding increase in neutral conversation.

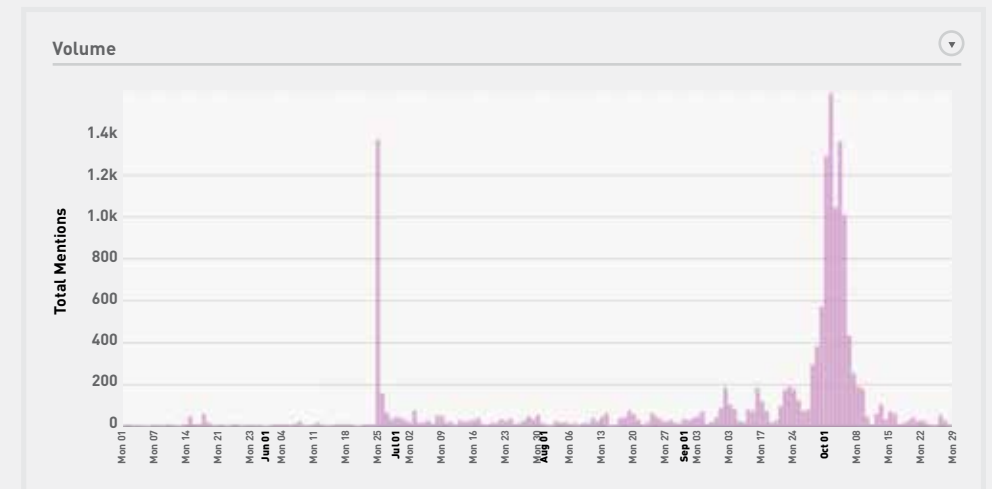


Figure 2. Between 1 May and 22 October 2012, Rocking the Daisies was mentioned 14 979 times online.

Predictably, 50% of the total online conversation took place over the festival weekend (4 to 7 October 2012). A more interesting question is: what caused the spike in conversation on June 28?



Figure 3. The announcement of an international headlining act is depicted here in a tweet.

By inputting the date range (28 June) into BrandsEye’s filters, Rocking the Daisies organisers saw that their announcement of an international band headlining the festival caused huge excitement among consumers.

In 2011, the top themes of conversation had revolved around the party atmosphere of the festival, being away and camping for the weekend, and tickets – prices, purchasing and being sold out. In 2012, the same conversation themes were evident; however, Bloc Party was a notable addition.



Figure 4. A word cloud depicting themes in the conversation around the festival.

In fact, online conversation on 28 June alone created 3 098 545 opportunities to see (OTS). OTS is the number of potential views made possible by the total number of online mentions. The same amount of paid media coverage would have cost R707 284.

'Tickets' were another top theme of online conversation. This was split between excitement about purchasing them, and disappointment at not buying tickets before they sold out. Additionally, people in other areas of the country expressed disappointment at being unable to attend it.



Figure 5. A tweet requesting tickers for Rocking the Daisies.

BrandsEye also picked up all blogger communications regarding ticket giveaways, which gave consumers one last chance to get tickets for the festival.



Figure 6. A tweet announcing competition winners.

BrandsEye's data illustrated that 79.1% of online conversation took place on Twitter and 15.1% on Facebook, with various other platforms taking up small percentages as well. Of this, 4.3% of online conversation came from press sources.

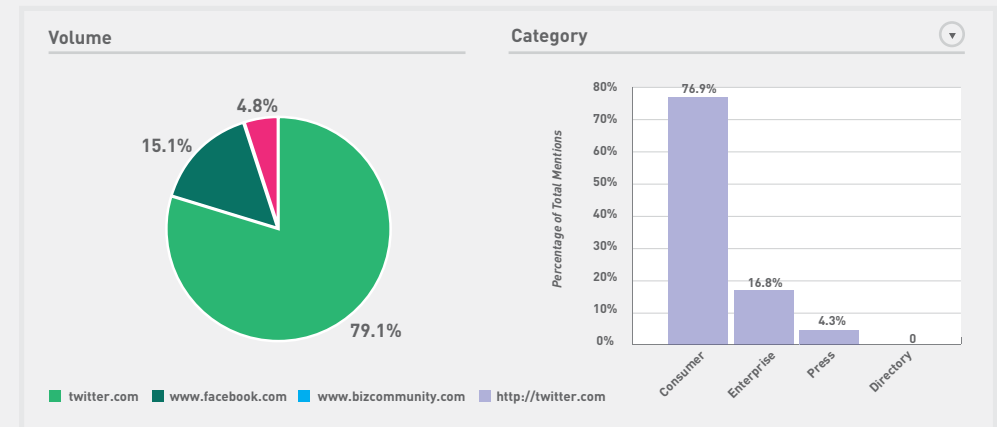


Figure 7. A graph depicting the spread of conversation across platforms and press sources.

The high level of Interest from the press demonstrates the popularity of the event. When it comes to proving a return on investment (ROI) to sponsors, Rocking the Daisies was able to monitor usage of the sponsor names in connection with the festival. BrandsEye tracked these keywords and was able to rank the sponsors by who was mentioned most frequently online.

The most frequently mentioned sponsors were the ones whose names were displayed on a stage. Furthermore, sponsors with favourable branding and signage gained additional exposure through online conversation.

Lastly, certain conversation trends have enabled organisers to identify opportunities for specialist sponsors based on attendees' complaints and desires. At future events, sponsorship deals with car wash products and flu remedies (for example) could simultaneously benefit concertgoers, organisers and sponsors.

Based on these insights, BrandsEye could offer Rocking the Daisies three valuable recommendations:

1. Since the response was so large and positive, Rocking the Daisies should plan to introduce more international content at future festivals, based on the hype it creates.
2. Because of the high demand and buzz around tickets, Rocking the Daisies organisers could substantiate an increase in sponsorship and ticket fees in the long term.
3. Since branded stages in particular provided a higher ROI, organisers could increase the costs of sponsorship packages or facilitate bidding for these positions, thereby increasing sponsorship revenue accordingly.

Overall, an online monitoring and insights tool such as BrandsEye is valuable for making appropriate business decisions based on real insights. This allows organisers to begin planning the next festival with confidence knowing that:

- Festival attendance will increase and attendees' experiences will be enhanced.
- Sponsors will achieve a higher ROI for their investment.
- Organisers can expect higher financial returns.

3.10 The bigger picture

Understanding your market is the foundation of every marketing activity, online or off. If you don't know who you're speaking to, or what your audience cares about, it's unlikely that your message will resonate with them.

Market research will define the content you create in your content marketing strategy, which naturally affects channels like email marketing, web writing, SEO and online advertising. It helps you find your audiences on social channels by indicating where they spend most of their time, and how they like interacting with your brand. It also helps you meet their needs by defining the touchpoints they expect from your brand, especially when it comes to creating web and mobile channels.

The more data you can gather about your audience, the better you will be able to optimise and improve your marketing efforts: market research is an excellent supplement to the quantitative data you can gather through data analytics.

3.10 Summary

Market research means gathering and analysing data in order to gain consumer insights, understand a market and make business decisions. Information can be gathered about customers, competitors and the market.

Research can be conducted based on secondary data, which refers to information or data that is already published, or based on primary data, which is data gathered specifically for a particular research problem.

Research can also be qualitative or quantitative. The Internet provides the tools for gathering qualitative data, while online tools such as surveys and web analytics packages are ideal for gathering quantitative data.

Surveys, online focus groups and online monitoring are three excellent ways to conduct research online.

Analytics and online report tools play a big role in providing data. While these are digital marketing tactics in themselves and are covered later in this book, keep in mind that they also provide information that can feed into research conducted for a particular purpose.

3.11 Case study questions

1. What were the key insights drawn in connection with the Rocking the Daisies festival?
2. How can the festival organisers take what they've learned to make changes? Suggest some ideas.
3. Why would ongoing monitoring be important in this case?

3.12 Chapter questions

1. What is the purpose of exploratory research?
2. What is primary research?
3. What role does online research play in the overall market research toolkit?

3.13 Further reading

www.pluggedinco.com/blog – Plugged In is a treasure trove of all things related to market research. Visit it regularly to stay up to date on trends or developments.

www.freshnetworks.com/blog/category/social-media-listening-2 – Visit this blogs for lots of useful articles on social media listening and monitoring.

<http://s3.amazonaws.com/SurveyMonkeyFiles/SmartSurvey.pdf> – The Smart Survey Design is a useful white paper that will help you master drawing up relevant web surveys.

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04

Content Marketing Strategy

What's inside: This chapter look at **brands** as publishers who need to understand those for whom they are producing content. **Content marketing strategy** is explained and situated within the greater marketing mix. **Organisational** and **conceptual requirements** are considered in line with your overall marketing strategy.

4.1 Introduction

While the phrase 'content is king' has been referenced for some time, it is only in the recent few years that Content Marketing Strategy has been solidified into a discipline of its own. Defining content marketing strategy can be tricky, however, with some practitioners focusing more on the role it plays in information architecture and others believing that it should be considered on a campaign by campaign basis. This chapter looks at content marketing strategy from a holistic perspective, as a process that includes an understanding of all the content your brand is creating, those for whom it is intended, and to what purpose. There is a need to understand the brand and consumer context and match these to the best route to customer (in terms of tactics). Ultimately this supports the design of communication that impacts people enough to make them want to share the content on.

In this chapter, you will learn:

- To understand the role of content marketing strategy within your marketing plan
- To be familiar with the steps involved in developing your content marketing strategy
- To recognise some models for understanding how types of content are absorbed or experienced by your target audience.

4.2 Key terms and concepts

Term	Definition
Algorithm	An algorithm is a mathematical, computational or statistical method pre-determined to take a number of variables into account and output a single, quantifiable result that is a function of all the variables. A good example of a commonly used algorithm is the one used by Google to determine which pages rank more highly on SERPs.
Content audit	An examination and evaluation of the existing content which a brand publishes.
Editor	A person who determines the ultimate content of a text, traditionally understood in the newspaper, magazine or publishing industry context.
Information architecture	The way data and content are organised, structured and labelled to support usability.
Persona	In this context, a character created to define a group of readers in order to speak to them as though they were a unique reader. Usually a hypothetical character created to represent and personify a set of traits.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.

4.3 Defining Content marketing

Content marketing is an umbrella term, one which focuses on matching content (information or entertainment) to your customer needs at whichever stage they are in the buying cycle or customer journey. Unlike TV, where the advertiser pushes messages to a captive audience, the focus is on engaging content, which means that marketers must think like publishers (attracting an audience) rather than seeing themselves as advertisers (buying an audience) of a product. The Internet has, in many respects, cut out the middle man. Consumers and brands can now connect directly through a number of easily accessible online platforms.

The Content Marketing Institute offers the following definition:

Content marketing is a marketing technique of creating and distributing relevant and valuable content to attract, acquire, and engage a clearly defined and understood target audience – with the objective of driving profitable customer action (Content Marketing Institute, 2013).

This definition applies to all the spaces in which you share content – your website, campaigns and competitions, a company blog or the social media space – as well as the way in which that information is shared.

Kristina Halvorson suggests the model illustrated below for approaching the different areas of content marketing strategy.

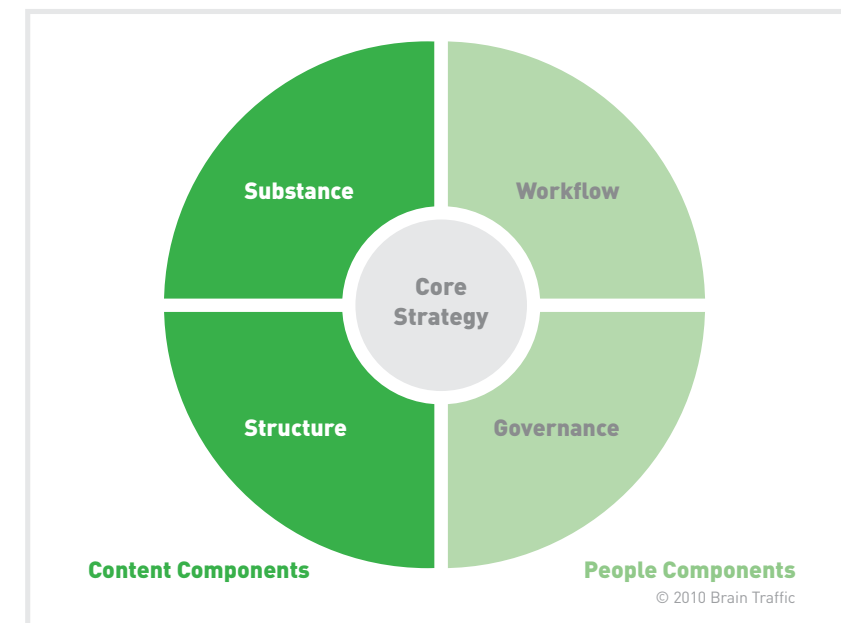


Figure 1. A model explaining Content Strategy.
(Source: With permission, Kristina Halvorson, 2010)

Content components

- **Substance:** Who are you trying to reach, and why?
- **Structure:** Where is your content? How is it organised? How do people find your content?

People components

- **Workflow:** How does your content happen?
- **Governance:** Politics, guidelines and standards (Halvorson, 2010).

As you can see in the above discussion, Halvorson suggests that one consider the bigger picture of content creation rather than just the product which is the end result. Content marketing looks at staff, tools, processes and outcomes. The end goal for these processes is, as outlined in the Content Marketing Institute definition, the delivery of a “profitable customer action”. All content should be created with a strategic outcome in mind.

4.4 Strategic building blocks

4.4.1 Translating your brand essence

The brand essence is a sentence which sums up the unique attributes of a brand and the basis for its emotional connection with customers. Your brand essence should assist in defining a tone of voice for your brand and the style in which it engages with its customers. The brand essence can be a useful guide for ensuring that the content you create (and your marketing activity) represents the brand appropriately. Some relate this to your brand story. What is your reason for being, and how do you connect that with the interests of your customers?

Will it Blend? is a video series by Blendtec which builds on this principle. Blendtec produce industrial blenders. Their value proposition is that they can blend anything, and their very popular videos demonstrate this.



Figure 2. Blendtec produce a series of entertaining videos focused on blending objects discussed in popular culture, such as iPhones.

(Source: Blendtec, n.d.)

4.4.2 Market research and consumer personas

The sweet spot for content marketing lies in an intercept between the marketing goals of a brand, the brand personality as it guides and differentiates that brand in the marketplace, and the consumer motivation for paying any attention to a brand at all. One device that is used in addressing consumer needs is the development of a consumer persona.

A persona is a profile that a writer creates to embody the characteristics of the target audience for whom he or she is writing.

Personas are based on the profile of users of your content. Creating a profile is all about considering the characteristics of your readers and their needs and desires.

It's important to focus on the motivations of the persona that you may create, rather than exterior signifiers that lead to the creation of a stereotype. The persona assists you in segmenting and understanding your target market and is a framework through which you can guide any content that you create.

4.4.3 Creating content pillars

Linked to the brand identity are certain themes, which could also be called content pillars. These are areas of focus that support the creation of content that match to a consumer's interest. These themes must be true to the brand essence, not focused directly on sales, and should also speak to the interests of the audience.

NOTE

Read more about this in the *Writing for Digital* chapter.

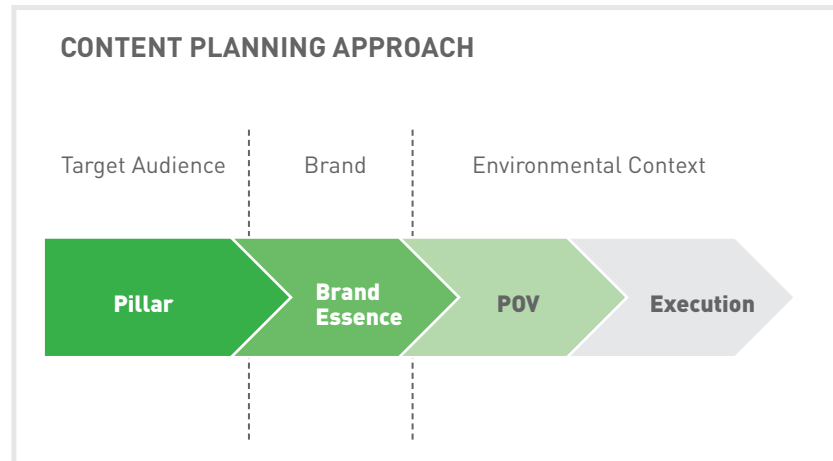


Figure 3. Content pillars can be considered in line with the brand's essence, and then situated within the context of the reader.

For Coca-Cola, for example, consumer interests filtered through the brand essence of 'Coke brings joy' could result in the following pillars:

- Friendship
- Sharing is caring
- Spreading smiles.

These pillars are then used as the basis on which to develop content ideas.



Figure 4. Coca-Cola express their brand essence in all of their communications, as demonstrated in the Tweet above.

In the above tweet, we can see how a particular content pillar was translated into a question that is focused on relationships and family. It also encourages engagement from the audience by asking for their input.

Another example which demonstrates this is how Corona brought their brand essence to life through an interactive documentary. The documentary depicted the first encounter that people from Bulin in China, 7 500km from the coast, had with the beach. You can view it here: <http://www.coronaextra.eu>.



Figure 5. Corona created an interactive documentary that tied their brand essence to a powerful human story (<http://www.coronaextra.eu/china/>).

4.4.4 Matching content formats to objectives

Information can be presented through any number of mediums, which is both an opportunity and a challenge faced by content marketers. Digital distribution allows for videos, images, interactive infographics and any number of other formats. To gain and keep the attention of consumers/users, it's sometimes not enough to rely simply on text-based forms of content. The role of the content marketer is to select the right medium based on overall objectives, production capabilities, and the needs of the audience. Consider the illustration below.



Figure 6. Different forms of content will support different objectives. (Adapted from Bosomworth, 2012)

As discussed in the *Digital Marketing Strategy* chapter, determining your objectives is an essential part of your marketing planning, and should feed into your content marketing strategy. Understanding the journey your consumers go through as they approach your ultimate sales goal will enable you to match content formats to their needs. A humorous video may be successful in initially making potential customers aware of your brand. Once you have their attention, however, a research paper or useful case study could be more effective in convincing them that you are the best choice in the market.

There are many examples of online journalism using multimedia to convey information most effectively to their readers. *The New York Times* has presented a number of different methods for conveying complex information in an engaging manner. 'Snow Fall' by John Branch is one example (<http://www.nytimes.com/projects/2012/snow-fall/#/?part=tunnel-creek>).



Figure 7. 'The New York Times' is a media brand that has embraced interactive media features for presenting complex news stories. (Source: The New York Times)

The New York Times also often publishes infographics that demonstrate this principle powerfully.

	A	B	C	D	E	F
1	Section	Page	URL	Description	Keep/Edit/Delete	Notes
2	About Us					
3		Vision	about-us/vision	Company vision statement, drawn from main brochure (now outdated)	Edit, add info from Mission page, add annual reports.	
4		Mission	about-us/mission	Company value statements. Seems to replicate Vision page. Includes links to annual reports (PDFs)	Delete	
5		The team	about-us/team	Lists bios of key staff members. Missing some staff, other bios 3-5 years out of date, some bios very brief, some very long.	Edit: update bios, edit to make more consistent. Add email addresses.	Second most-visited page in section.
6		Contact details	about-us/contact	Contact details: physical, phone, email. Includes operational hour info.	Update with Google map. Operational hours needs more prominence.	Most visited page in section
7		News	about-us/news	News items, currently divided into press releases; news; announcements; 'from the boss'. 32 items over 3 years.	Keep, but suggest deleting most old articles & removing categories.	
8		Events	about-us/event	Mixture of business and external events. No events loaded this year. 13 events over past 3 years.	Delete. Suggest publishing event info as news items & promoting on homepage.	

Figure 8. A content audit conducted for a website. (Source: Liubarets)

In order to take advantage of these various forms of content delivery, it is necessary to build the correct capabilities. But how do you determine what forms of content you need?

4.4.5 The content audit

Once you have established your marketing goals, your brand personality and a guiding understanding of who you are trying to reach, the content audit is a sometimes laborious but necessary next step. The content audit involves an audit of all the existing content supplied by the brand – the website, white papers, articles, videos and content shared on social media sites can all be considered. An assessment can then be made of how well these pieces of content match the strategic needs of the brand and its audience.

While you can either thoroughly immerse yourself in this process or attempt to get a more time-efficient overview, the goal is to map what is currently on offer with what is necessary in mind. It is important not just to understand what you have, but also how it is currently organised and accessed by your audience.

Many practitioners suggest the use of a spreadsheet to achieve this. Content can be found to be either mismatched to the goals of the organisation, or spot on. Most importantly, you can establish what is missing. Are your customer needs being addressed? Where do the opportunities lie?

4.5 Content creation

4.5.1 Learning from publishers

The term **brand as publisher** refers to repositioning the function of the marketer or brand manager. Rather than focusing on the immediate sale or conversion, a publisher focuses on value and interest for the reader, and building a relationship based on supplying information or entertainment that suits the customer's needs. Makeup.com by L'Oreal is an oft-cited example of a brand publishing useful tips and content that does not link to a product or sales directly, but demonstrates how the brand can give consumers the lifestyle they desire.

4.5.2 Resource planning – thinking like a publisher

Content marketing touches on a number of departments in an organisation. Marketing, sales, customer service, corporate communications, human resources and website management teams should all be aware of the content marketing strategy for a business. Co-ordinating content between these teams can be challenging if not impossible if turnaround times are tight. This is why it is important not only to look at where content production should live in your organisation, but also to map the workflow of content creation, an essential function. Are designers involved? Where does quality control take place? Where can a piece of content be adapted and reused on a different distribution channel?

Some organisations opt to have a central role for someone who oversees content; others build in-house departments. Whether you are outsourcing to a publishing house, or training a team in house, the decision must be made and planned for so that workflow can be mapped in order to facilitate your strategic needs.

4.5.3 Always on content planning

Given that a large part of the global population is constantly engaging with content via various digital devices and platforms, it is necessary to consider content creation in terms of not only short campaign bursts, but ongoing delivery and engagement. Consider the illustration below.

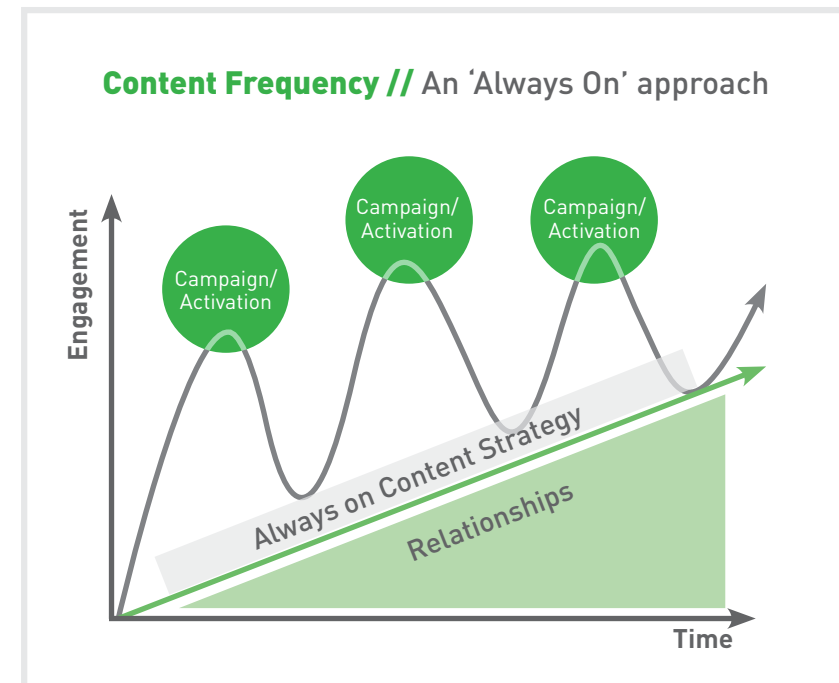


Figure 9. An always-on-content strategy approach builds relationships and engagement.

By constantly engaging with audiences, something which is well suited to social media, for example, it is possible to build and maintain a relationship with customers/readers. Consider the image above, where constant engagement builds on the peaks of engagement that shorter term campaigns can offer.

4.5.4 Content models

Your organisation's content requirements and objectives should determine the structure of your content teams. Do you have a need for ongoing content creation, or are there less frequent high-input forms of content that will benefit your organisation? There are many models which are constantly evolving, so do invest in some research around what will suit your organisation. We have outlined two approaches below.

Stock and flow

Stock content refers to bigger, beautiful assets that require more investment and age well, meaning that they will be interesting in six months as well as today. 'The Dewarists', by Dewars, is an example of this. A high-production value TV show was created and sponsored by the brand in order to achieve awareness across its target market.



Figure 10. 'The Dewarists' was a TV show sponsored by alcohol brand, Dewars.

Flow content has a lower production value and a quicker production and publishing time frame. Images depicting what is going on at a business on any given day, for example, freshly baked goods at a bakery, can be placed in this category.



Figure 11. Cake Boss posts images depicting their preparations on their Facebook page.

Both types of content should be considered for balancing out a content strategy.

Destination and distributed thinking

It can also be useful to consider destination and distributed content. Content which you are either sending out to the world through various platforms and networks, or which pulls your reader towards a page on your website or an article on your blog. Rather than focusing solely on driving readers to your owned media spaces, such as your website, consider how to create content that engages with your target audience in the spaces where they are active.

4.6 Content channel distribution

4.6.1 Algorithmic curation

Algorithmic curation is a term that refers to the algorithms platforms have created for dealing with information overload. Various platforms, like Facebook and the search engine Google, use algorithms to filter out the amount of information that is delivered to users. Each algorithm will use a number of factors to determine what is actually relevant and interesting to the person doing a search, or looking at their news feed. One of the factors that influences whether a piece of content is considered relevant is how much an individual engages with the brand's presence on that platform over time. Posts shared by a Facebook page, for example, may reach only users who have previously engaged with posts from that page through commenting or liking. It is therefore important to create content that encourages engagement and sharing.

4.6.2 Understanding your channels

Understanding the channels through which you share content is as important as the crafting of that content itself. Reaching people effectively will only be achieved if the medium supports the message and vice versa. Social media, email marketing, mobile marketing and video marketing are just some disciplines that will form part of your content creation arsenal. The rest of this book is dedicated to best practice in communicating effectively through the various digital disciplines available to you.

4.7 Tools of the trade

In order to support the ongoing production of interesting content, it is necessary to have some planning documents in place. Consider those outlined below.

- **Brand style guides**

This document guides anyone creating content for a brand at any time. What is the tone of voice and brand personality? How is it best represented visually, and what are the brand colours and fonts? This can be a challenging document to put together, and it usually isn't the content marketer who is tasked with doing so, but is essential to aligning brand communications. It is also a document that tends to be 'live' – it is constantly updated as the brand and content landscapes evolve and new conventions need to come into play.

- **Content calendars**

Content calendars assist the content marketer in planning the content they will be sharing, across which platforms, and when. The more advance planning is undertaken, the easier it is to react quickly to tactical opportunities.

- **Workflow map**

A workflow map documents the path a piece of content takes when it is created. What are the steps in approval, how is it optimised for digital publishing, who has final sign off? Is it a duplicate of existing content, and where else can it be used? A workflow map assists you in streamlining this process.

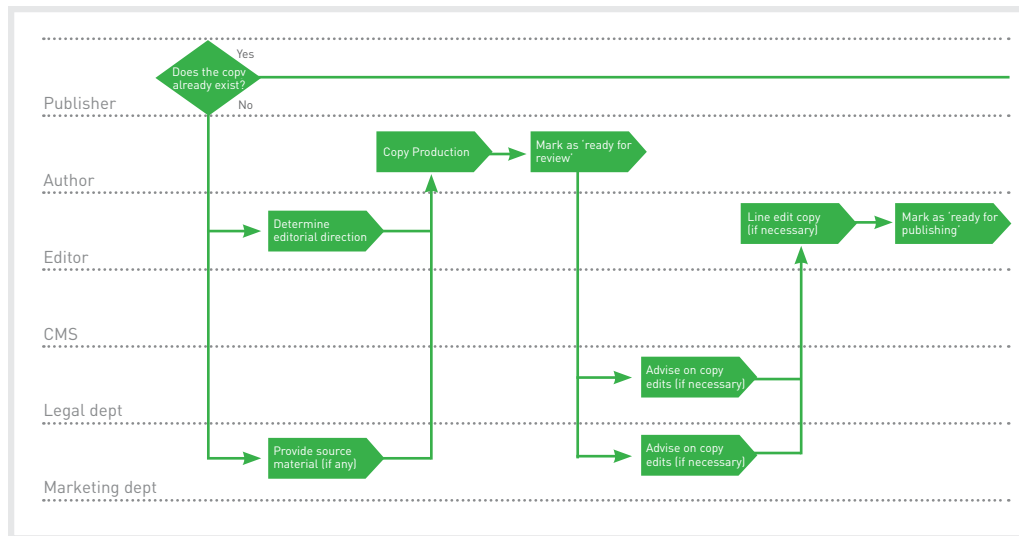


Figure 12. An example of a workflow map for an article. (Adapted from: Ingserv)

NOTE

See an example of a content calendar in the *Social Media Strategy* chapter, and an example of a persona in the *Writing for Digital* chapter.

- **Persona map**

As discussed, the persona map assists content creators in focusing on those for whom they are in fact creating content, and what the motivations of consumers would be.

4.8 Advantages and challenges

Content marketing can position your brand as an expert through the sharing of useful content in your specific field. It also enables you to reach the customer who has a fragmented attention span spread across many devices and content touchpoints.

One of the more powerful benefits, however, is that you can learn a lot about your target consumer through the content with which they do or do not engage. The more targeted and ongoing your content, the more data you can gather about how effectively you are reaching those you need to.

One of the great challenges in content marketing is providing content that is truly interesting and engaging to the right people – the right mix of subject matter and brand. Matching content to the required outcome for your strategic purposes takes dedication and focus. In the context of ongoing content production, it can also be a challenge to maintain levels of quality over time, which is why process and quality assurance steps must be put in place. Consider that the goal is not to create as much content as possible, rather it is to focus on relevance and content that matches strategic outcomes.

4.9 Case study – Coca-Cola Company

4.9.1 One-line summary

Coca-Cola develops a content strategy in order to double sales by 2020 and redefine their business.

4.9.2 The problem

The Coca-Cola Company is a global beverage producer. Even though the brand is globally known and extremely successful, it has set its sights on doubling its business by 2020. It also noted two key changes in the market: consumers were creating an ever-increasing amount of brand content, and technology had empowered them as never before to shape the brand.

Coca-Cola decided that it needed to harness the power of content marketing in order to engage consumers.

4.9.3 The solution

In order to meet their goal of doubling the size of their business by 2020, Coca-Cola created a multifaceted content strategy based on two key content pillars: liquid and linked.

‘Liquid’ embodies the notion that our networked and connected world enables ideas to spread rapidly – liquid ideas are those that capture the imagination and cannot be controlled once they are put out in the world.

While liquid ideas are creative, they are grounded in a linked strategy. ‘Linked’ makes sure that ideas are always centred on the core brand story and experience – in other words, liquid ideas must reflect positively on the Coca-Cola brand. It also means that all the brand channels should be coherent and unified.

4.9.4 The outcome

Rather than focusing on traditional advertising, Coca-Cola has thrown its weight behind a global content strategy to meet its rather ambitious goals. It identified that audiences are now largely in control of the brand, and that it is more important to have an open conversation with them than to broadcast advertising at them.

Coca-Cola's content marketing plan is based on three core elements:

1. **Storytelling:** As part of the liquid principle, Coca-Cola has recognised the power of storytelling. Stories create an emotional connection, connect people and spread ideas, which leads to conversations. In dynamic storytelling, a brand idea is released to the audience and picked up in various conversations and channels. One of Coca-Cola's key brand stories is 'living positively' and showing how the brand makes the world a better place. This content idea also forms part of the company values, showing the importance of aligning business and content objectives. Each sub-brand has a big-picture content plan that outlines key elements of the story and how they will be disseminated.
2. **Consumer-generated content:** Consumer-generated content forms a cornerstone of the content strategy. Brand stories encourage consumer reactions and engagement (and are often created by the consumers themselves). The worldwide distribution of creativity and technology means that consumers have greater power than ever before to create and drive brand stories, which leads to emotional connections. Coca-Cola actively encourages fans to 'act and react' to the stories.
3. **Unified brand experience:** Finally, Coca-Cola puts a lot of emphasis on creating a unified, coherent and accessible brand experience. While there are many stories to be told about the brand, it is still necessary to filter and edit these to ensure that they speak to the brand's key values. By focusing on content excellence, Coca-Cola is creating value and engagement, not merely noise. Maintaining this means that the brand must communicate effectively with staff around the world.

In keeping with the 'linked' principle, these ideas will always be linked to business data and business objectives to solve problems (TheCognitiveMedia, n.d.).

Content on the web will spread regardless of whether a brand is involved or not – but Coca-Cola has picked up that they can steer the story themselves. By engaging proactively, building powerful, viral brand stories and giving consumers some control over how the brand is expressed, they are able to steer the conversation to their benefit – this is the true power of content marketing.

4.10 The bigger picture

Content is a significant component of many digital marketing disciplines. When creating content, you should always keep the principles of writing for the web in mind.

- **Email marketing** relies on great content – since most people suffer from email fatigue, they will only stop to read emails that they know are of high quality and that provide excellent content.
- **Social media marketing** also depends on sharing relevant and valuable content with social fans. While your brand promise may get them to your social page, your ongoing stream of quality content will encourage them to interact and share, spreading the word about your company.
- **Search engine optimisation** is strongly influenced by the quality, frequency and value of content. Not only will search engines favour your site, but others will choose to link in to your content, creating a valuable referrer for your brand.
- **Video marketing** is a whole new approach to content, in which you create dynamic and shareable videos specifically tailored to the interests and needs of your audience.
- **Mobile marketing** also requires that you consider the unique requirements of your audiences across a series of devices. If you understand the role that each device plays in a user's life and buying cycle, you can tailor content to optimally address their needs.

4.11 Summary

Content marketing presents a pull mechanism for the marketer rather than a push one. Brands must consider their brand identity and the market they are trying to reach in order to create targeted and valuable brand content that delivers on strategic objectives.

It's about more than creating a piece of content – content marketing strategy looks at how you structure your organisation to create that content, and how you match specific types of content and methods of delivery for achieving strategic outcomes.

These ideas need to resonate with people rather than simply existing across an array of media with which they are presented.

4.12 Case study questions

1. What is Coca Cola's overarching goal? Why is this significant?
2. What is brand storytelling?
3. What do you think about the content audit? Is it a process you would undertake?

4.13 Chapter questions

1. What is content marketing strategy?
2. Why is the customer journey or buying cycle relevant to content marketing strategy?
3. How do you decide what new forms of content your brand needs?

4.14 Further reading

<http://contentstrategy.com/> – Content strategy for the web.

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Part 2

Create

Introduction to Create

Research, planning and strategy lay the foundation for building successful digital assets – such as websites, mobile sites, web and social media applications, videos and even simple landing pages. In the next few chapters, we detail how to create some of these digital assets.

One of the biggest challenges is creating assets that make the most of rapidly evolving technology, while remaining accessible to the range of users in your market. In writing these chapters, we faced a similar challenge: technology is constantly in flux. Because of this, we have focused on principles for success.

Creating digital assets is not a solitary job. There are many different teams of experts who work together to create something that will delight users. So, it stands to reason that there are many aspects to consider when looking at creating digital assets.

This is a book aimed at marketers, rather than developers and designers, but it is important that you also understand the opportunities and challenges of the web. This is a vast subject, but hopefully the next few chapters will leave you feeling equipped to ask the right questions when relying on others to get the job done for you.

We start by looking at User Experience Design – the process of creating remarkable, user-friendly and effective digital assets. The Web Development and Design chapter focuses on creating websites, but the principles apply to a range of digital assets and devices (with a dedicated section on mobile). While we won't teach you how to build a website yourself, we do equip you with what you need to know to manage and be involved in the process. Lastly, we look at Writing for Digital – after all, the words we read on the screen are often a vehicle for much of our online experience. All three of these practices work closely together when we create web assets.



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05

User Experience Design

What's inside: An **introduction** to the world of **User Experience (UX)**, and some **key terms and concepts** you need to understand. This is followed by a breakdown of the **key UX principles** you should always keep in mind, and some special considerations for **mobile UX**. From there, we take you on a step-by-step journey to **implementing a UX project**, including substantial guidelines on **testing** and optimising the results of your UX design process.

5.1 Introduction

Have you ever visited a website that was just plain confusing, with broken links, unintuitive navigation and long, rambling text? Or, conversely, have you had a web experience that just *worked*, where everything was clear, easy and even enjoyable to use? If so, you've encountered the extremes of user experience design. Excellent UX can delight and convert customers. Conversely, bad UX can lead to lost revenue and less chance of repeat visitors.

User experience design is a web concept that is difficult to define specifically, since it's often a case of 'you'll know it when you see it'. A standard website needs to be reliable, functional and convenient – but a great UX website needs to be enjoyable to use, and an experience worth sharing. What this means in practice for a specific website, company, audience or context can differ, but the principle remains the same – delivering a great experience to users, and making it easy for them to convert to your desired goal. UX is the first, foundational step of an effective digital asset.

In this chapter, you will learn:

- To think about web projects with a UX mindset
- How to create usable, amazing and enjoyable experiences for desktop and mobile users
- The nuts and bolts of implementing UX strategy step by step
- About a variety of awesome UX tools.

5.2 Key terms and concepts

Term	Definition
Above the fold	The content that appears on a screen without a user having to scroll.
Accessibility	The degree to which a website is available to users with physical challenges or technical limitations.
Breadcrumbs	Links, usually on the top of the page, that indicate where a page is in the hierarchy of the website.
Call to action (CTA)	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today etc.).
Content audit	An examination and evaluation of existing content on a website.
Content strategy	In this context, a plan that outlines what content is needed for a web project and when and how it will be created.

Convention	A common rule or tried-and-tested way in which something is done.
Conversion	Completing an action or actions that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Credibility	In this context, how trustworthy, safe and legitimate a website looks.
Information architecture	The way data and content are organised, structured and labelled to support usability.
Navigation	How a web user interacts with the user interface to navigate through a website, and the elements that assist in maximising usability.
Prototype	Interactive wireframes that have been linked together like a website, so that they can be navigated through by clicking and scrolling.
Responsive design	Designing a website so that it changes depending on the device it is displayed on.
Search engine optimisation (SEO)	The process of improving website rankings on search engine results pages.
Sitemap	On a website, a page that links to every other page in the website, and displays these links organised according to the information hierarchy. In UX terminology, this is the visualised structural plan for how the website's pages will be laid out and organised.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
User-centred design (UCD)	The design philosophy where designers identify how a product is likely to be used, taking user behaviour into consideration and prioritising user wants and needs, and placing the user at the centre of the entire experience.
User experience design (UXD)	The process of applying proven principles, techniques and features to create and optimise how a system behaves, mapping out all the touchpoints a user experiences to create consistency in the interaction with the brand.
User interface (UI)	The user-facing part of the tool or platform – the actual website, application, hardware or tool with which the user interacts.
Wireframe	The skeletal outline of the layout of a web page. This can be rough and general, or very detailed.

5.3 Understanding UX design

User experience (UX) can be defined as all the experiences (physical, sensory, emotional and mental) that a person has when interacting with a digital tool.

The field of UX is full of similar-sounding jargon, so here's a quick guide to the terms you should know.

User experience (UX) is the overall satisfaction a user gets from interacting with a product or digital tool.

User experience design (UXD, sometimes UED) is the process of applying proven principles, techniques and features to a digital tool to create and optimise the user experience.

User-centred design (UCD) is the design philosophy that prioritises the user's needs and wants above all else, and places the user at the centre of the entire experience. This often entails research and testing with real users of the site or product.

User interface (UI) is the user-facing part of the tool or platform – the part of the actual website, application or tool that the user interacts with.

Usability means how user friendly, efficient and slick the digital product is.

Online UX can be divided into two broad categories:

1. **Functional UX.** This covers the elements of the user experience that relate to actually using the tool – such as working technical elements, navigation, search and links.
2. **Creative UX.** This is the bigger, harder-to-define impression created by the tool – the so-called 'wow' factor that covers visual and creative elements.

There are six qualities that make up good UX:

- **Findability** – can I find it easily? Does it appear high up in the search results?
- **Accessibility** – can I use it when I need it? Does it work on my mobile phone, or on a slow Internet connection? Can I use it as a disabled person?

- **Desirability** – do I want to use it? Is it a pleasant experience, or do I dread logging in?
- **Usability** – is it easy to use? Are the tools I need intuitive and easy to find?
- **Credibility** – do I trust it? Is this website legitimate?
- **Usefulness** – does it add value to me? Will I get something out of the time I spend interacting with it?

5.3.1 The benefits of UX

There are some real, tangible benefits to applying UX design to digital marketing strategies.

Good UX is an excellent way to differentiate yourself in the market and give yourself a competitive advantage. If your online touchpoints are easy, fun, intuitive and awesome to use, your customers won't have any reason to look elsewhere.

Good UX research and design allows you to find the best solution for your needs. Every business, website and online service is unique in some way, which means that the way it is set up must be unique too.

Amazon's **\$300 million button** is perhaps the most dramatic example of how a simple UX fix can impact the business. Amazon managed to gain an extra \$300 million worth of sales simply by changing their 'Register' button to one that read 'Continue' instead. The number of customers increased by 45% because they no longer felt they needed to go through an onerous registration process simply to fulfil a basic shopping action. In fact, nothing else about the purchase process had been changed!

Every marketer knows that the ideal customer is a happy customer. People who love the experience you give them will become loyal clients, and possibly even brand evangelists – people who will sing your praises far and wide.

Applying UX principles means that you can get your digital tools working earlier, with much better functionality, at a lower cost. This is because you can cut out features and elements that you simply don't need, and focus on the core user experience. This optimised development process leads, in turn, to sites that are easier and cheaper to maintain, upgrade and support across multiple platforms.

NOTE

User experience design roles differ in the skills needed and the functions performed. Try this UX job title generator for a bit of fun: aaronweyenberg.com/uxgenerator

5.4 Core principles of UX design

5.4.1 User-centric design

While this may seem like the most obvious point, it's surprising how often the user is forgotten in the *user* experience. Business owners, marketers and web developers frequently focus on creating the web platforms they want and think are best, instead of really interrogating what the user needs. Often, the performance of web assets is compromised when the design process is driven only by internal business needs (for instance, ensuring that each department in the company has a space that it controls on the home page) at the expense of what the user needs.

When designing for the user, you need to ask the following questions:

- Who is the user?
- What are the user's wants and needs from your platform?
- Why is the user really coming to your website?
- What are the user's capabilities, web skills and available technology?
- What features would make the user's experience easier and better?

NOTE

Read more about this in the *Market Research* chapter.

The answers to these questions will come out of user research, as discussed in the *Market Research* chapter earlier in this book.

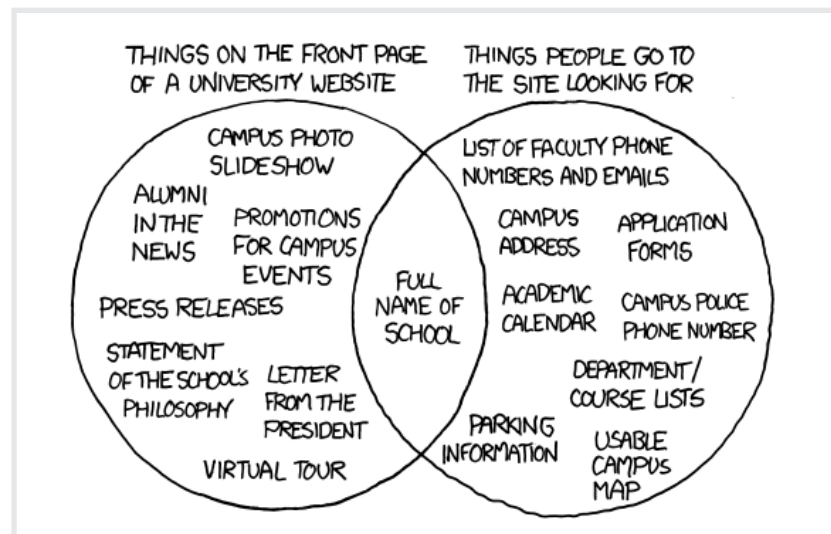


Figure 1. It's essential to give users exactly what they need. (Source: XKCD.com)

Of course, many users may not know exactly what their wants and needs are! It is the UX practitioner's job to discover these through research and interpret them in the best way possible. Keep Henry Ford's famous quote in mind here: "If I had asked people what they wanted, they would have said faster horses."

5.4.2 Usability and conventions

Usability is about making the digital assets we build easy and intuitive to use. To paraphrase Steve Krug, don't make your users think: they should just do (Krug, 1997-2013).

One of the most important aspects of usability involves sticking to standard conventions, which are simply common rules or ways of displaying or structuring things on the web. Popular conventions include:

- Links that are blue and underlined
- Navigation menus at the top or left of the web page
- The logo in the top left hand corner, which is linked to take the user back to the home page
- Search boxes placed at the top of the page, using standard wording such as 'search', or a magnifying glass icon.

NOTE

Can you think of any other web conventions? How have these evolved over time, and how important is it to stick to the rules?

Ensure that all website elements (such as menus, logos, colours and layout) are distinct, easy to find and kept consistent throughout the site.

There are some key 'don'ts' when it comes to building a user-friendly and usable website:

- Never resize windows or launch the site in a pop-up.
- Don't use entry or splash pages (a page that site visitors encounter first before reaching the home page).
- Never build a site entirely in Flash – most search engine spiders cannot effectively trawl Flash sites, and these will not work on many mobile devices.
- Don't distract users with 'Christmas trees' (blinking images, flashing lights, automatic sound, scrolling text, unusual fonts, etc.).

It's useful to consider usability guidelines to ensure that your website is on track. MIT Information Services & Technology provides a usability checklist online at <http://ist.mit.edu/usability>.

5.4.3 Simplicity

In UX projects, the simpler option is almost always the better, more user-friendly one. Though your service or product may be complex, that doesn't mean your customer-facing web portals need to be. In fact, it's important to remember that most customers want only the most basic information from you, such as "What is this?" and "How does it work?"

Simplicity can mean several things:

- **Lots of empty space.** In design terms, this is referred to as negative or white space (though, of course, it need not specifically be white). Dark text on a light background is easiest to read. In general, the more effectively 'breathing room' is placed between various page elements, lines of text, and zones of the page, the easier it is for the user to grasp where everything is.
- **Fewer options.** When users have to make choices, there is a lot of psychology at play – worry about making the right choice, confusion and doubt over the options, indecision paralysis and more. Studies have found that people faced with fewer choices generally choose more quickly and confidently, and are more satisfied with their decision afterwards (Roller, 2010).
- **Plain language.** Unless your website is aimed at a highly specialised technical field, there's usually no need to get fancy with the words you use. Clear, simple, well-structured language is the best option when creating a great UX.
- **Sticking to conventions.** As we've said before, conventions are excellent shortcuts for keeping things simple for users. There's no need to reinvent the wheel and try to teach your users a whole new way of navigating a website.

NOTE

Read more about this in the *Writing for Digital* chapter.

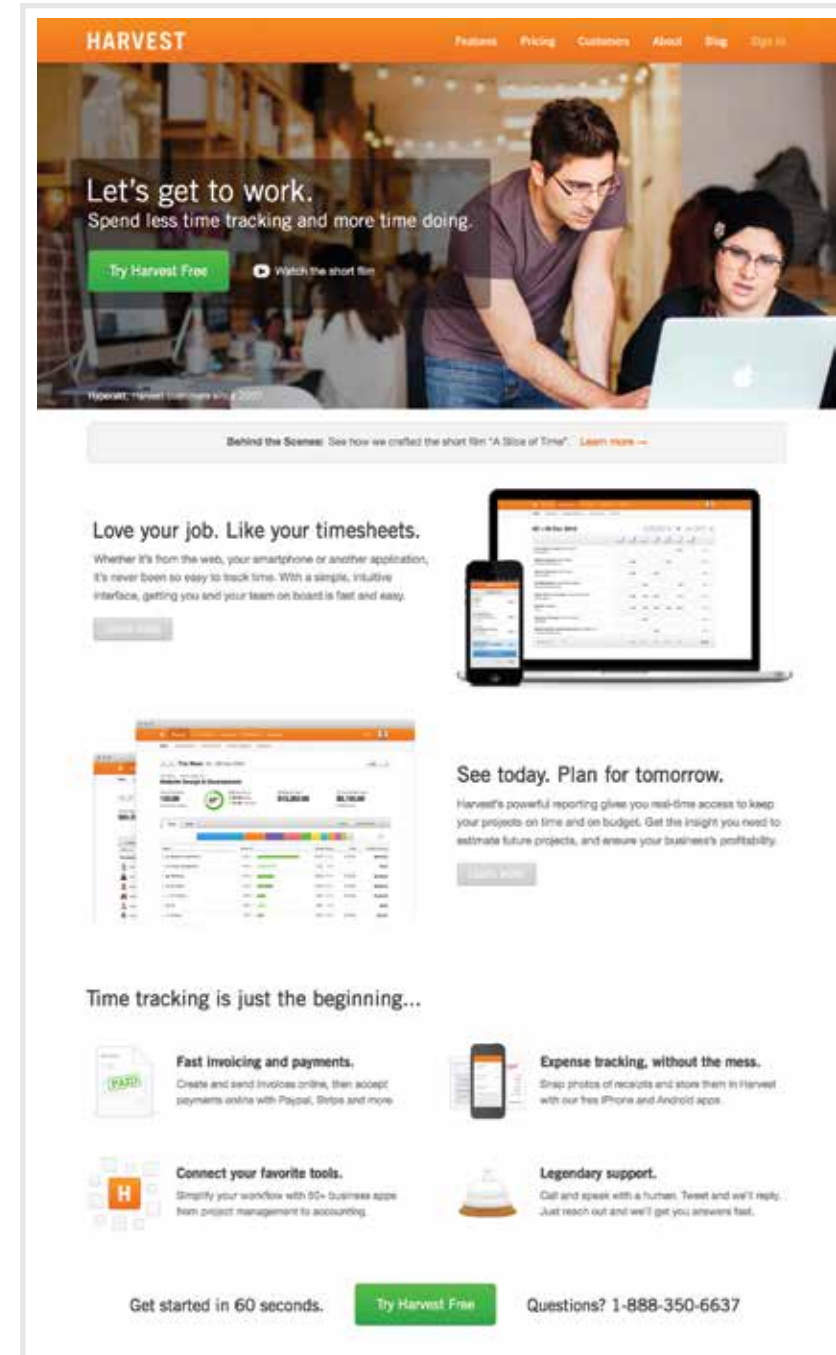


Figure 2. The Harvest website has a clean, simple and inviting design. (<http://www.getharvest.com/>)

5.4.4 Credibility

Credibility means how trustworthy and legitimate something looks, and is a big consideration for web users when deciding to use your website or not. Here are some of the cues that visitors use to determine the credibility of a website:

- **Looks** – does it look professional and beautiful?
- **Prominent phone numbers and addresses where they are easy to locate** – this assures the visitor that there are real people behind the website, and that they are in easy reach.
- **Informative and personal ‘about us’** – your customers want to see the inner workings of a company and are especially interested in learning more about the head honchos. Consider including employee pictures and profiles to add personality to the site.
- **Genuine testimonials** – this is a great way to show potential customers what your current customers have to say about your organisation. Trust is vital, and this is one way to encourage it.



Figure 3. Genuine user testimonials can create a sense of credibility, as is found here at www.zipcar.com.

- **Logos of associations and awards** – if you belong to any relevant industry associations or have won any awards, feature them. Not only does this go a long way towards establishing your credibility, but it will show that you’re at the top of your game, a notch above the competition.
- **Links to credible third-party references or endorsements** – this is a way to assert your credibility without tooting your own horn.
- **Fresh, up-to-date content** – a news section that was last updated a year ago implies that nothing has happened since (or that no one cares enough to update it).
- **No errors** – spelling and grammar mistakes are exceptionally unprofessional, and while the large majority of readers may not pick them up, the one or two who do will question your credibility. This also extends to broken links, malfunctioning tools, and interactive elements that don’t work as advertised.

5.5 Mobile UX

Mobile should not be an afterthought, in UX or any other digital endeavour – it should be prioritised in strategy, design and implementation. The ‘mobile first’ movement supports this notion, and aims to create mobile user experiences first, and then adapt these for the web (instead of the other way around). Designing this way has many advantages, since the principles of good mobile UX works just as well on full sites – simple designs, linear interfaces and clear buttons and features. Mobile first also focuses you on deciding which content is most essential.

5.5.1 Mobile devices

One of the biggest challenges to mobile UX, and indeed any venture involving mobile, is the sheer number of different device categories and models available – one estimate puts the number of mobile phone handset models at over 6300, running over 20 distinct operating systems (CEM4Mobile, 2011).

Broadly speaking, there are five main categories that mobile devices can fall into.

- **Dumb or basic phones offer no Internet access, just basic call and SMS functionality.**
- **Feature phones are rudimentary mobile phones that can perform basic communication functions, and possibly connect to the web, but have limited functionality.**

NOTE

Another concept to consider here is ‘content first’. This is the notion that you should decide which content to provide on your site, depending on whether someone is viewing it from a mobile device or a desktop computer, and then adapt the layout and material to that device. The thread uniting these different approaches is a desire to place the user’s needs at the centre of the design.

- Smartphones are powerful mini-computers that have full web access, larger screens, and a wide range of functionality.
- Tablets are larger versions of smartphones, usually including touchscreens, and are able to perform a wide range of connectivity, lifestyle and work functions.
- Other mobile devices – such as ebook readers, netbooks, portable game consoles and other media devices such as iPods – can have a range of features and varying ability to connect to the web.

5.5.2 Mobile users

Mobile users can be different from desktop users. There is an ongoing debate about whether the mobile users' context (for example, lounging on the couch versus rushing to a meeting) affects the way in which they use their devices. There's no definitive way of defining mobile context – it all comes down to the user, brand and web asset – but it's important to remember that you need to take the user's context into account, whatever it may be. We will look at ways of engaging mobile users in the *Mobile Marketing* chapter later in this book, but for now it is important to understand some ways in which their behaviour can differ from standard desktop users. Mobile users are:

- **Goal orientated.** They turn to mobile devices to answer a question, quickly check email, find information or get directions. They often have a distinct purpose in mind when using their phone.
- **Time conscious.** There are two aspects to this. On the one hand, mobile users are often looking for urgent or time-sensitive information (such as the address of the restaurant they are looking for), so answers should be available as quickly as possible. On the other hand, the mobile device is also frequently used to kill time or as a source of entertainment (reading articles on the couch, or playing games while waiting in a queue), so content is also crucial. User research will tell you which of these groups your users fall and how you need to structure your site accordingly.
- **Search dominant.** Even users who know what they are looking for tend to navigate there via search (for example, typing the brand name into Google) rather than accessing the page from a bookmark or typing the URL directly into the browser bar.
- **Locally focused.** 50% of all mobile searches in 2012 were for local information (Sterling, 2012). Since mobile phones are always carried, users turn to them to find information on things in their surroundings – from local businesses to more detail on a product they have just seen.

NOTE

Read more about this in the *Mobile Marketing* chapter.

NOTE

Some mobile users use their phones for browsing in a similar way one would use a desktop computer. How does your audience use their devices?

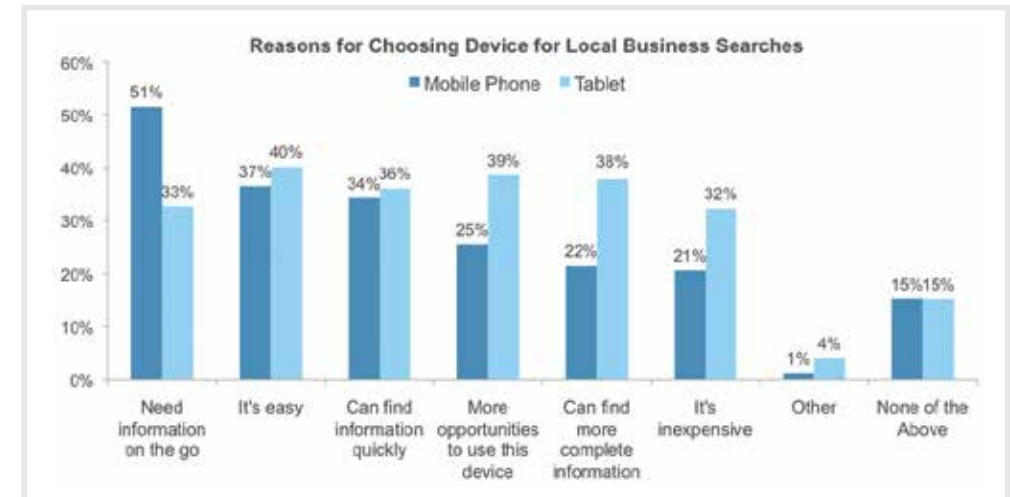


Figure 4. Reasons why people conduct mobile searches. (Source: Sterling, 2012)

5.5.3 Limitations of mobile

While there are many benefits to mobile, there are also challenges that the UX practitioner needs to overcome.

- **Small screens.** Even the largest smartphones are screens many times smaller than a standard laptop (and tablets fall somewhere between the two). This, quite simply, means that the user has a much smaller window through which to perceive and understand the website, so it's difficult to get an overall impression of where things are or what's important.
- **Difficult inputs.** Mobile phones don't come with full-sized keyboards and mice, so they are usually a lot more difficult to operate fluidly and accurately than desktop computers (touchscreens may be the exception here, although they also have their own pitfalls).
- **Slow connection speeds.** Many mobile phone users, especially in developing countries, are on slow Internet connections – and even fast options such as 3G can often be more sluggish than a desktop equivalent. This makes loading large websites or images slow and frustrating – and also expensive in terms of data costs.
- **Slow hardware.** Sometimes the slowness comes from the hardware itself – the more basic the phone, the slower its processing components are likely to be, making the simple act of opening the browser and loading a page time consuming.

5.5.4 Universal mobile UX principles

NOTE

As will be discussed in the *Web Development and Design* chapter, there are three main approaches to creating mobile-accessible content:

1. **Mobile websites (called mobi sites)**
2. **Native and web applications (called apps)**
3. **Responsive websites (websites that adapt to the device).**

Whether you're designing a mobi website, an app or a nifty responsive site, there are some principles you should always keep in mind:

- **Simplify.** Show information only when it's needed. While you should ensure that the mobile asset provides all the same information as the desktop equivalent, this doesn't need to be presented in the same format or volume.
- **Reduce loading time.** Try to keep content and actions on the same page, as this ensures better performance as there are fewer page loads.
- **Encourage exploration.** Especially on touchscreens, users like to browse elements and explore. This makes them feel in control.
- **Give feedback.** Ensure that it is clear when the user performs an action. This can be achieved through animations and other visual cues.
- **Communicate consistently.** Ensure that you deliver the same message across all your touchpoints, for example, by using the same icons on the website as you would on the mobile app – this prevents users from having to relearn how you communicate.
- **Predict what your user wants.** Include functionality such as auto-complete or predictive text. Remove as much manual input as possible to streamline users' experience.

NOTE

Mobile users generally prefer to scroll in one direction.

5.6 Step-by-step guide to UX design

The UX design process happens before, during and after the website is being built. It ties in very closely with strategy and research, web development and design, SEO, content strategy and creation, and later conversion optimisation.

5.6.1. Conduct research and discovery

Step one involves conducting detailed research on the business, the users, and the technology involved. This is covered fully in the chapter *Market Research*, which includes user research. Doing this lets UX practitioners know exactly what they need to do to address the needs of the business and audience. This will generate a lot of data that needs to be filtered and organised.

NOTE

Read more about this in the *Market Research* chapter.

5.6.2. Create the site's basic structure

Information architecture (IA) is about managing information – taking a lot of raw data and applying tools and techniques to it to make it manageable and usable. The purpose of this is to make communication and understanding easier by putting information into logical, clear and familiar structures.

The information architecture of a site is crucial to usability. Categories and pages should flow from broad to narrow. An intuitively designed structure will guide the user to the site's goals.

IA operates on both the micro and the macro level – it covers everything from the way individual pages are laid out (where the navigation and headings are, for example) to the way entire websites are put together.

Most websites have a hierarchical structure, which means there are broad, important pages at the top, and narrower, more specific and less important pages further down. Hierarchical structures can either be very broad and shallow (many main sections with few lower pages) or very narrow and deep (with few main sections and many pages below). It's up to the UX practitioner to find the right balance of breadth and depth.

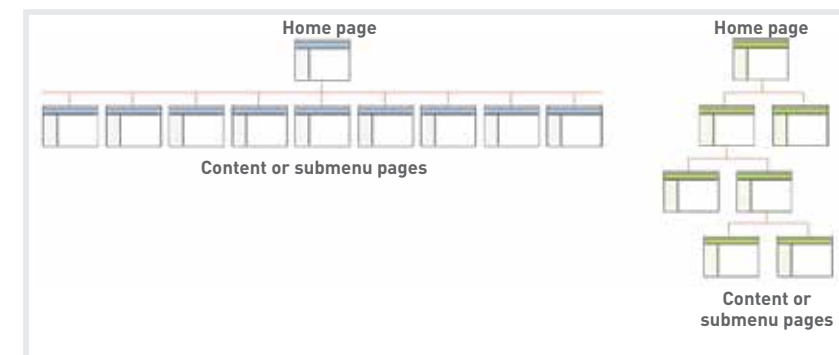


Figure 5. A broad, shallow hierarchy on the left, and a narrow, deep hierarchy on the right. (Source: Lynch and Horton)

5.6.3. Analyse content

If you're working on a website that already exists, it will be populated with a wide variety of content. In this case, you need to perform a **content audit**, which is an examination and evaluation of the existing material.

NOTE

If the website is new – or if you plan to add new content to an existing website – you need to put together a **content strategy**. This is a plan that outlines what content is needed and when and how it will be created. There's no single template or model for this – every content strategy will be unique.

The content strategy is largely the responsibility of the strategy, copy and concept teams, but the UX practitioner needs to get involved in a few key roles. The points that UX needs to address are:

- **What the site should achieve.** Naturally, the content should work towards achieving the site's and business' objectives.
- **What the user wants and needs.** By conducting thorough user research you should be able to answer this question. Provide only content that will add real value to the user.
- **What makes the content unique, valuable or different.** Content needs to provide value and engagement to the user.
- **The tone and language used.** You need to give thought here to the tone (fun, light, serious, and so on), register (formal or informal) and style you will use across your content. Make sure this is consistent across text, images, videos and other content types.

Principles of creating content

There are three key points you should consider here.

1. Structure

Content needs to be written so that users can find the information they need as quickly as possible. The chapter on *Writing for Digital* will cover this in more detail. Copy can be made more easily readable by:

- Highlighting or bolding key phrases and words
- Using bulleted lists
- Using paragraphs to break up information
- Using descriptive and distinct headings.

Read more about this in the *Content Marketing Strategy* chapter.

NOTE

Don't forget SEO. There are lots of ways in which a website can be optimised during the UX planning process – have a look at the SEO chapter for some guidelines on what to include.

2. Hierarchy

On the page, use an inverted pyramid style for your copy. The important information should be at the top of the page, to make for easy scanning. The heading comes first, the largest and boldest type on the page. The subheading or blurb follows this, and then the content is presented in a descending scale of importance.

3. Relevance

Above all, the content on the page must be relevant to the user and the purpose of the page itself. If a user clicks to read about a product but ends up on a page with content about the company, their experience is going to be tarnished.

5.6.4. Create a sitemap

In UX terminology, a sitemap is the visualised structural plan for how the website's pages will be laid out and organised.

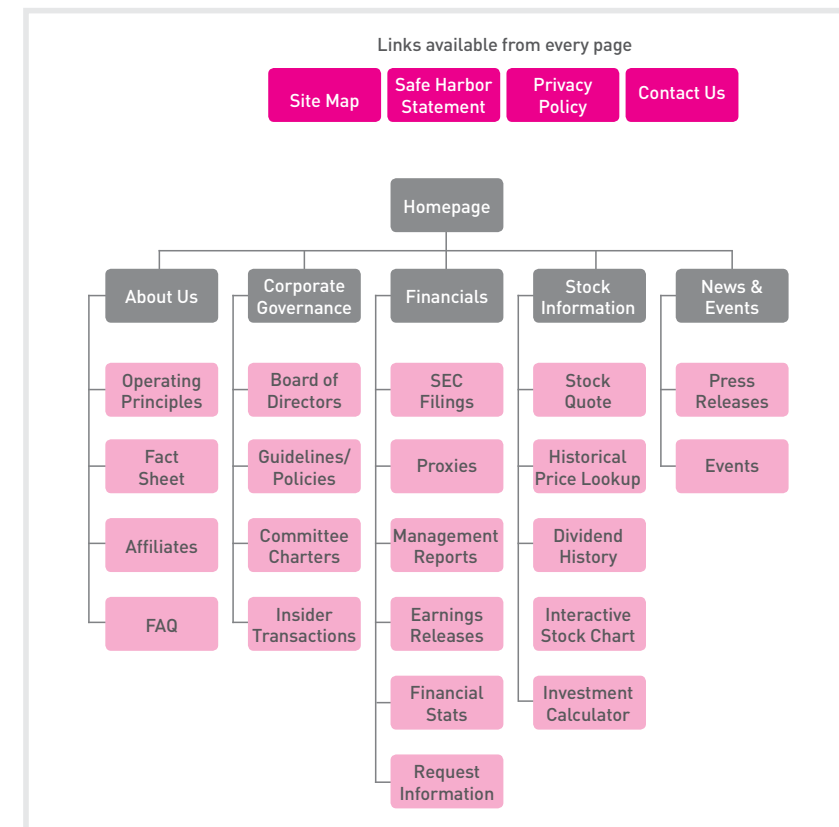


Figure 6. An example of a sitemap.

To create the visuals for your sitemap, you can follow this process.

1. Start by defining your home page – this should be the top item in the hierarchy.
2. Place the main navigation items below this.
3. Start arranging your pages of content below the main navigational items, according to the results of your user testing and insight, and your information architecture structure.
4. Continue adding pages below this until you have placed all your content. Make sure that every page is accessible from at least one other page – it may seem obvious, but you'd be surprised how often this is overlooked!
5. Define any other static navigation elements (footer, sidebar, header navigation, search tools). Place these in your diagram in a logical place (possibly branching off directly from the home page, or as separate blocks).

Which sitemap is which?

The term 'sitemap' can have two meanings. One is the way it's defined above – the structural plan of the website. The other is a page on your website that lists all the pages available in a logical and accessible way. An example is the Apple website's sitemap: www.apple.com/sitemap. This sitemap should be available from every page. Dynamic sitemaps can be employed so that the sitemap is updated automatically as information is added to the website. Different sitemaps exist for different purposes, so investigate what your users would find most useful.

5.6.5. Build the navigation

The navigation should guide users easily through all the pages of a website; it is not just about menus. Successful navigation should help a user to answer four basic questions:

1. Where am I?

Navigation should let the users know where they are in the site. Breadcrumb links, clear page titles, URLs and menu changes all help to show the user where he or she is. The larger your site is and the more levels it has, the more important it becomes to give your users an indicator of where they are in relation to everything else on the site. This helps the users to understand the content of the page that they are on, and makes them feel more confident in navigating further through the site.

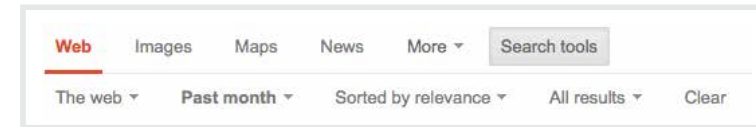


Figure 7. Google's search results have clear navigation options.

2. How did I get here?

Breadcrumb navigation often indicates the general path a user may have taken. In the case of site search, the keyword used should be indicated on the results page.

3. Where can I go next?

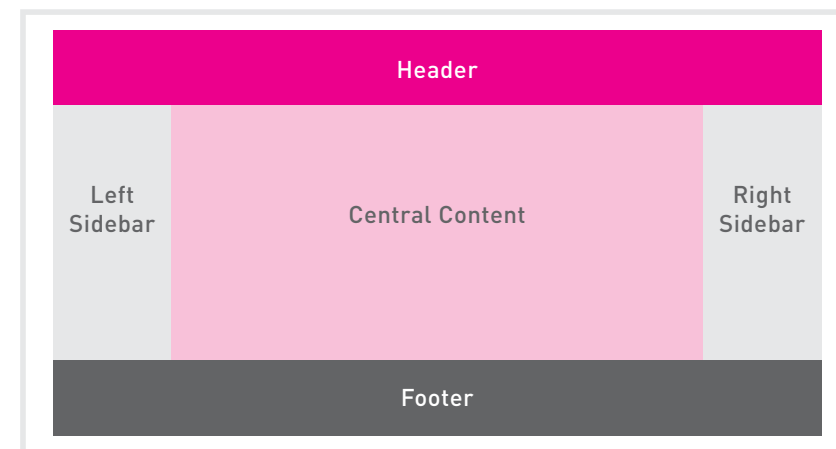
Navigation clues let a user know where to go to next – such as 'add to cart' on an eCommerce site, or a contextual link that indicates 'read more'. The key is making the options clear to the user.

4. How do I get home?

It has become convention that the logo of the website takes the user back to the home page, but many users still look in the main menu for the word 'home'. Make sure that they can get back to the beginning quickly and easily. Test the designs against users' ability to navigate home. Never design based on your own assumptions.

5.6.6. Create the layout

A web page can be broken down roughly into four zones:



The four main zones of a website

NOTE

There is a tendency, when thinking about navigation, to plan in only one direction – from the home page down the chain of pages in the hierarchy. But very often, users arrive at the site from a link or search result that drops them deep in the website. This makes it equally important to look at reverse navigation – getting from the bottom-level pages back up to the top.

Each of these typically contains certain types of elements and content, such as:

1. **The header**, at the top of the page – used to identify the site and provide basic tools
 - Logo or identifying mark (possibly including the brand's tagline)
 - Main navigation
 - Login feature
 - Search bar
2. **The central content area** – used to present the main content
 - The actual content specific to the page – text, images, videos and more (this can be broken into several columns)
 - CTAs of various kinds
3. **The sidebar**, either on the left or the right, or sometimes on both sides – used to present secondary content and tools
 - Secondary navigation bar, or other navigation features (for example, blog article archive by date)
 - CTAs, including buttons and signup forms
 - Additional content, like links or snippets
4. **The footer**, at the bottom of the page – used for important but non-prominent content and resources
 - Legal information, privacy policy and disclaimers
 - Additional navigation elements.

NOTE

Users consider information in sidebars to be less important, so don't put your key message here.

The most important consideration for any page layout is the content – what needs to be included, what is the most important action or piece of information, and how can this be structured to meet the user's needs? After all, web pages are created to support a user's journey.

Another important consideration here is the different types of pages that make up your website. Not all page types can, or should be, structured in the same way. For example, your home page is a unique location where you want to showcase the most prominent news, offers, features or tools. The pages you use for, say, blog articles or product listings will be laid out quite differently from the home page, but will have the same structure as each other. Then you might have other page types for the login page, and an entirely different approach for your eCommerce checkout.

Wireframes are the skeletal outlines of the layout of a web page. Their purpose is to map out the placement of various elements on the page as a guide for the designer to create the visual design, and the web developer to create the code and interactivity required. Wireframes can be **low fidelity** (very rough and basic sketches, barely resembling the final output) or **high fidelity** (very detailed, complex layouts including creative elements). Any website project will have several wireframes – at least one for each template page. Capture your first ideas on paper – it's the fastest and best way to capture good ideas.

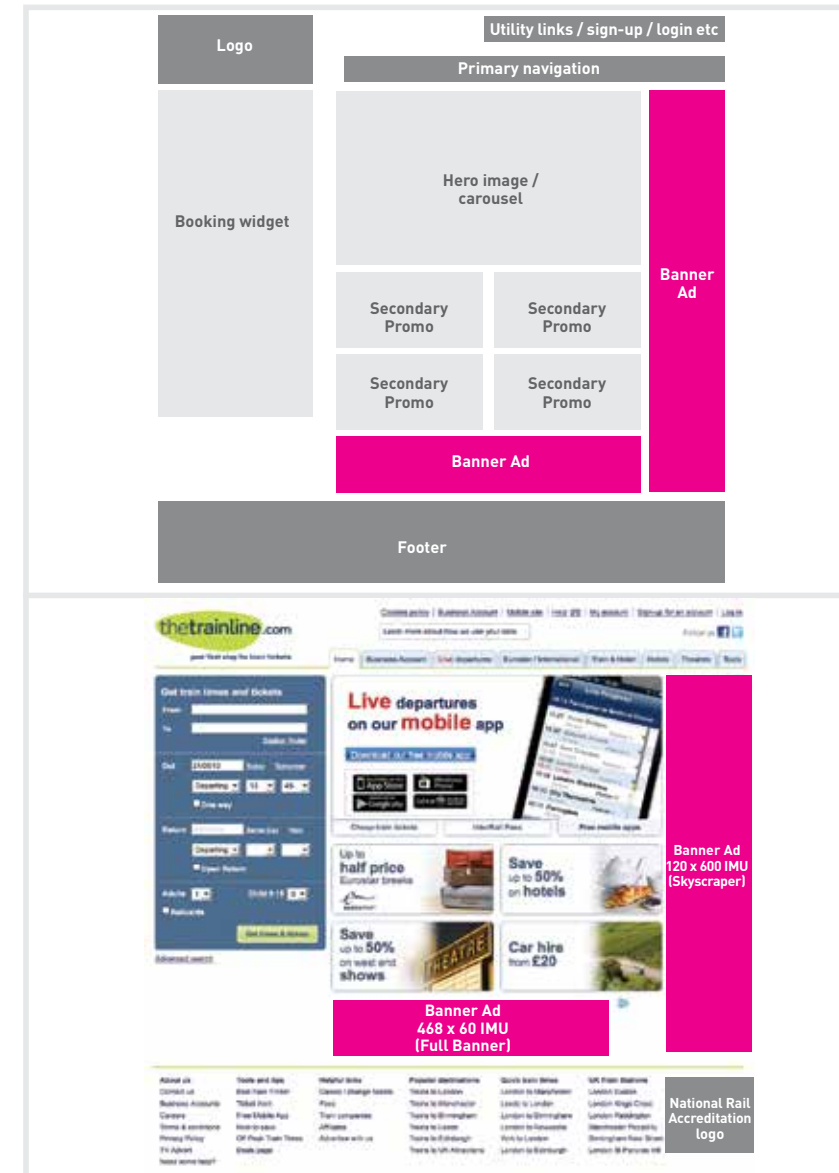


Figure 8. Low-fidelity and high-fidelity wireframes. (Source: NorthernUX)

Prototypes are a step up from wireframes, in that they are interactive. Prototypes are essentially sets of wireframes that have been linked together like a website, so that they can be navigated through by clicking and scrolling.

Prototypes are excellent tools for testing the flow and function of a proposed website before diving into the costly and lengthy design and development phases – they can save a lot of time, money and effort by identifying problems and improvements upfront. Again, paper prototyping is the best method for fast, iterative UX design.

5.6.7. Assemble the other elements

Once you've defined your content and mapped out the basic layout of each page, you need to add in all the extra elements that your website will need – remember that the page should only ever contain the elements a user might need to support them in their task. These can include:

NOTE

Paper prototypes make testing quick and easy – they're portable, easy to use, and don't require complex tools, internet connections or user skills.

- **Calls to action.** CTAs can take a variety of shapes and forms, from in-text links to large buttons.
- **Forms.** These are interactive fields where users can enter their contact details or other information, for example, to sign up for a newsletter or enter a competition.
- **Search.** Many sites can benefit from having a search function, both to help users navigate and to make finding specific information easier.

Calls to Action

Successful CTAs are simple, quick, clear actions that don't require the user to do anything scary or make a commitment. They should always do exactly what they state to instil confidence and clarity. It's all about managing the user's expectations – do they actually go where they think they will, or perform the action they expect?

Positioning

The primary CTA should usually appear above the fold to capture the attention focused here. Other CTAs can appear below the fold, and the main CTA can also be repeated lower down.

Prioritisation

A single web page can be built around one CTA, or could incorporate a wide range of possible desirable actions. This all comes down to what the page and website overall is seeking to achieve, based on the business requirements.

When multiple CTAs are used, there should be one primary one that stands out strongly and the others should be more muted, playing a supporting role. CTAs can be differentiated through colour, shape, placement and size. The less choice, the better.

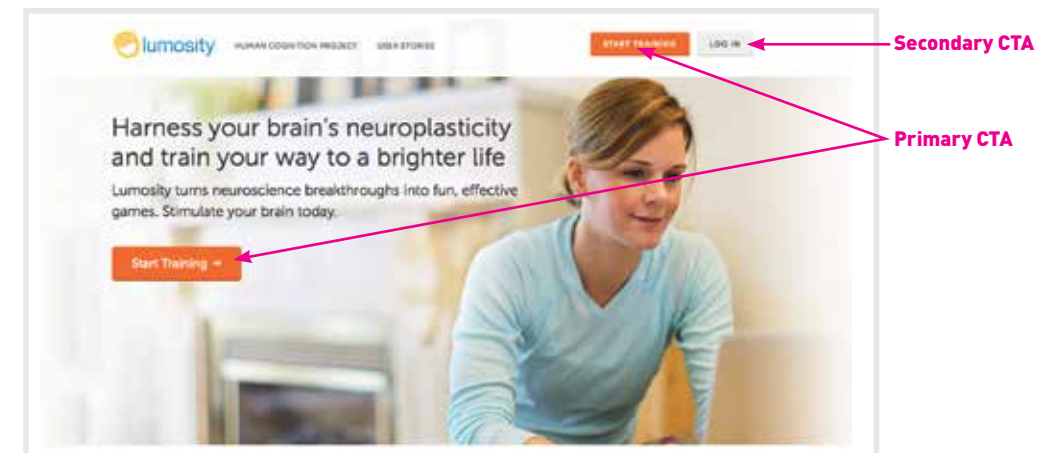


Figure 9. The Lumosity website has a clear primary CTA (in orange) and a less-prominent secondary CTA (in grey).

Clickability

Any CTAs that can be clicked must look 'tactile', or touchable. This means they must stand out somehow from the background and from static elements. One approach is to make the button look like a *real* button, standing out from its environment. Another train of thought advocates for the 'flat design' approach as a more elegant and modern expression of this.



Figure 10. Clickable CTA buttons.



Figure 11. Buttons with a flat design.

Quantity

Finally, be sure not to overwhelm users with too many choices. Stick to one central CTA per page, making it obvious to users what the main goal, action or outcome of the page is.

Forms

Forms are extremely useful tools for gathering user information and encouraging interaction on the site. Users are generally familiar with them and have some experience filling them out, and there are lots of web conventions that govern how these should be set up. As a general rule, the shorter you can make your form, the better. The fewer fields a user has to fill out, the more likely they are to complete the process.

Steps and sections

Simple forms with only a few fields can be assembled as a series of boxes. For forms that are longer, for example, those in eCommerce checkouts or complex registration processes, it makes sense to split them up into manageable portions – and manage a user's expectations by clearly indicating what the next step is.



Figure 12. The Kalahari.com checkout process clearly indicates the steps (and forms) that the user must complete.

Relevance

Simplicity is a key consideration – forms should be as short and clear as possible. The effort must be equal to the reward gained. All of the fields included must be clearly relevant to the purpose of the form, otherwise the user may get confused or suspect that you are harvesting their information.

Assistance

It is a good idea to include help for users filling out forms. This is especially the case where a specific field requires inputs to be entered in a certain way – and doubly so for password fields with special rules. Users will not instinctively know the rules associated with specific fields, so you must give plenty of guidance along the way.

Figure 13. A simple form that provides assistance to users. (Source: Basecamp)

Validation

Validation means giving the user feedback on the inputs they have submitted – whether correct or incorrect. Validation can happen at two points – after the user has submitted the form, or during the process of filling out the form. The latter, called 'live inline validation', usually results in a much better user experience as the users know that their information is correct before submitting the form.

Figure 14. Twitter has a simple, intuitive sign-up form that provides clear guidance.

NOTE

Be aware of local laws that define what information you're allowed to collect, and how you can use it.

NOTE

Search

Search has three useful functions on a website – not only does it help users to find specific things, it also serves as an essential navigation aid for larger sites, and collects valuable data from keyword research about what the user is looking for.

For the most part, the way the search functions is created by the web developer, so we won't go into any technicalities here. From the UX practitioner's perspective, there are some important non-technical principles to bear in mind.

Positioning

Search will either be the primary starting point for your site, or it will be a useful additional tool. In the former case, for example, on a large eCommerce site such as Amazon, the search tool should be positioned centrally and visibly to encourage the user to use this as the main navigational tool. In the latter case, best practice dictates that it should be in the top right corner, or easily accessible in the sidebar.



Figure 15. The Amazon.com search bar is located prominently at the top of the page.

Accuracy

The better you can interpret what your user is searching for, the more relevant and accurate the search results can be. Google works very hard to fine-tune its search algorithm to ensure that users don't just get what they searched for, but what they *actually wanted* in the first place.

User research can suggest why someone would search your site in the first place, and what they would typically be looking for. Popularity and recentness of content are other key considerations.

Results

When it comes to displaying search results, there are a few key questions to ask:

- How many results should be displayed (per page)? Ten to 20 results per page is generally a good benchmark.
- What order should results be in? Most popular first? Cheapest? Newest? Closest match? This will depend on the nature of the site.
- Can results be filtered? Some websites allow users to do a second search constrained to the results of the first one.

- What happens if there are no results? If no search results are found, this should be stated clearly, followed by a list of the closest match of content to the search query – it's quite possible the searcher didn't know the exact term from what they are looking for or made a typo (though the site should be forgiving of these).

5.6.8. Define the visual design

Before a user interacts with your carefully considered content, your excellent navigation structure and slick search bar, their first impression comes from the look of the website – the colours, graphics, and overall design elements that are used. As people are spending more and more time on the web, they are less tolerant of websites that don't look good (and credible). While a website is not an art installation, it is a design project, and the fundamentals of good design apply.

While much of the visual design expertise will come from the graphic designer, it's valuable for the UX practitioner to know the following principles of visual design.

Colour

Colour has an incredible psychological effect on people. Based on our culture, preferences and learned cues, people interpret colours in very specific ways – and this can be used to inform and steer the user's experience.

When choosing the colour palette for the website, be aware of legibility and accessibility concerns. Using a lot of open or white space often makes sites appear simple and easy to read.

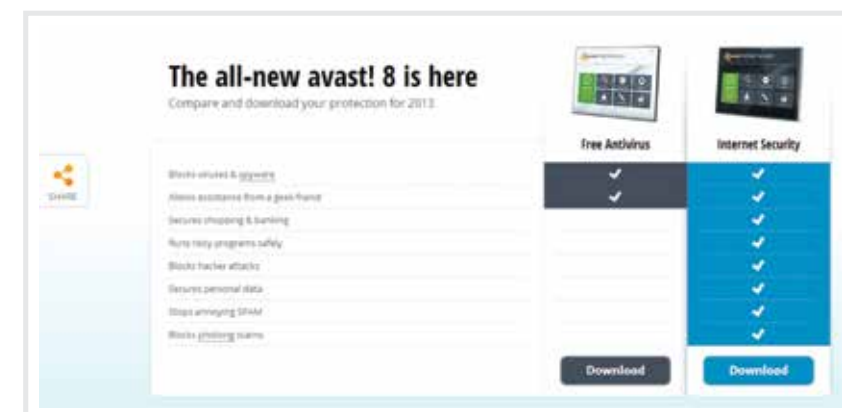


Figure 16. The Avast! website lays information out clearly and legibly, with good use of colour for emphasis.

NOTE

Read more about this in the *Web Development and Design* chapter.

Imagery

The choice of images used on the website can have a massive effect on how users behave and interact on the page. You can never be quite certain which images will have the best results, so this is one area where you will need to do a lot of testing (more on that below).

Humans tend to gravitate towards and identify with pictures of other humans. We have an innate instinct to look at faces to understand a person's feelings and mood – and we even look in the same direction as these characters, according to usability specialist James Breeze (Breeze, 2009).

5.6.9. Conduct testing

User testing means giving one or more users access to a website or prototype and observing how they behave when using it. The purpose of this is to discover problems and gain insights that can be used to improve the final product.

The goal of user testing is not to eliminate each and every potential problem on a website – that's simply not possible (especially if you consider how subjective this can be). The goal is to work towards creating the best possible experience for the user by constantly improving and optimising.

The two biggest questions around testing tend to be 'What do I test?' and 'When do I test it?' The answers are simple – **test as much as possible, as often as possible, and as early as possible.**

NOTE

Of course, in the real world, time and budget limitations will certainly have an impact on how much you can test – but your goal should always be to maximise testing, in whichever way you can.

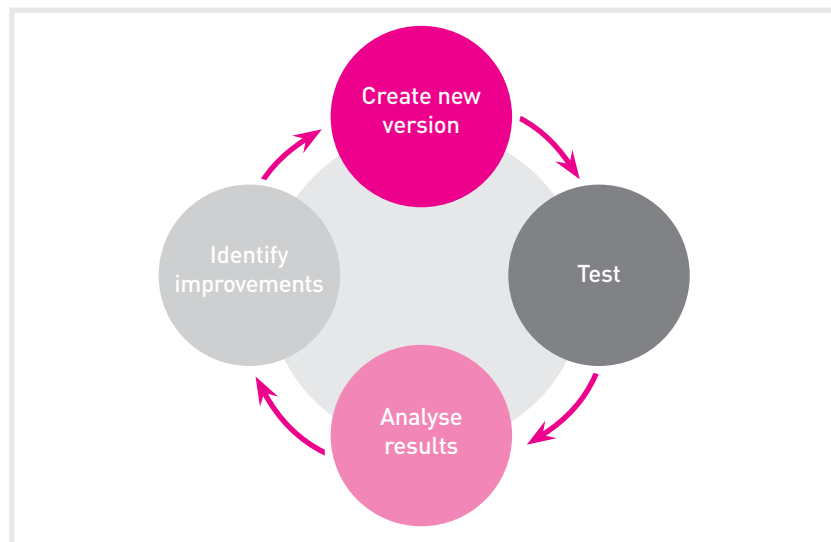


Figure 17. Iterative UX testing process.

User testing follows a set process.

1. Formulate a question to test

Spend a little time nailing down exactly why you want to perform a test and what you hope to learn from it. Formulating a simple, clear set of questions to test will allow you to focus on what's important, and will make choosing participants and techniques easier.

2. Choose a test and prepare

Once you know what the purpose of your test is, you can decide on a specific methodology to use. To choose the right one, answer these questions:

- How much time and money do I have for this test?
- What facilities are available?
- How many participants do I want to test?
- At what stage is the project?

User-testing methodologies

There are many ways to conduct UX user testing. Here are a few options to get you started.

Hallway testing

Hallway testing is the name given to quick, informal tests conducted in the office – they often literally involve stopping someone in the hallway and asking them to take part in a quick test.

This is a great way to perform broad, rough testing to help spot any glaring errors that the UX team haven't seen.

Observation and user labs

Generally, the purpose of an observational study in a user lab is to get a holistic overview of how the user responds to the website, and to spot any major issues. Looking at the user's body language and facial expressions can help to reveal how they feel about the experience itself, while looking at how they work through the tasks assigned to them shows the usability and intuitiveness of the website.

User labs tend to involve one participant at a time being tested and observed by one or more researchers. Specialised testing labs have features such as one-way mirrors and video feeds to facilitate this, but you could easily set up a webcam streaming to a computer outside the room to simulate the same effect.

NOTE

Read more about this in the *Conversion Optimisation* chapter.

Split testing and multivariate testing

A split test, also called an A/B test, involves creating two distinct versions of the same web page, usually with one specific element changed (for example, a different image or CTA). The versions are served to separate groups of users, and the tester then analyses which page is more effective.

A multivariate test functions in the same way, except that several different elements on the page are changed at the same time, showing which combination of elements works best. The chapter on *Conversion Optimisation* explains these in more detail.

Eye tracking

Eye tracking is the process of recording what exactly users are looking at, and how their gaze travels across a web page.

Eye tracking tests are useful for discovering if the user understands and can follow the basic flow of the web page, as well as to determine if certain elements are where users expect them to be. These can be conducted with webcams or specialised software that tracks a user's gaze or a mouse cursor.

Surveys

Surveys are questionnaires, usually distributed remotely via the website, that ask users for their impressions of the site in question. Surveys are excellent for canvassing opinions of your website after it has gone live.

Surveys can help to answer the 'why' questions that arise from quantitative data (such as web analytics). For example, you may find that users are abandoning a specific page on your website even though it has interesting content. The survey may reveal that they find the layout confusing or simply aren't as interested as you thought they'd be.

3. Find subjects

Possibly the biggest challenge in the testing process is that of finding the right test subjects. So, how do you do this?

First of all, draw up a list of criteria that you want your subjects to fulfil – must they be men or women, of a certain age, in a certain industry, with or without children? The considerations can be endless, so limit yourself to the top three or not more than five most important ones.

Now, spread the word about the test through the most appropriate channels to this group. This can involve everything from advertising in a glossy magazine to posting on a Facebook page to chatting to some friends or neighbours. You can also pay a market research recruitment agency to find suitable candidates. The method you

choose will depend largely on your budget and timeline, as well as on how many participants you want to recruit.

Once you get enough responses, you will have the chance to screen applicants. Screening is the process of filtering people into those who are suitable for the test and those who are not, because they do not meet certain criteria.

4. Test

At this point, you are ready to begin testing! Tell the user what you want them to do, and let the test run. Don't interfere!

5. Analyse

Analysing means taking all of this existing data and transforming it into accurate, objective and useful insights.

For example, your user observation study found that users tended to click on 'contact us' when looking for the opening times of a restaurant. It's up to the researcher to analyse this – were the users confused by something? Was there no other obvious place to click? Were they expecting to find this information easily, but found themselves struggling and making a best guess? Discovering the reason can then lead to possible solutions – possibly the opening hours should be placed on the home page or in the header; or perhaps they should simply be added to the 'contact us' page. It's these practical outcomes that are the cornerstones of UX testing.

6. Report

Reporting is the process of sharing your UX test results with the people who need them. Reports provide insights, information and recommendations by summarising the results of the testing phase, and the UX practitioner's analysis of what happened. Ideally, the whole team should be involved in analysing the test data to encourage them to buy in to the UX process.

Reporting can take various forms, from verbal discussions to professionally designed presentations. The most important consideration here is your audience and their needs.

7. Implement

Implementing means putting your user testing outcomes into practice. This will, of course, mean very different things at different stages of the project. If you're testing your overall approach in the beginning planning phase, the implementation could involve taking a new direction on the project. Testing a working high-fidelity prototype may reveal that some design elements need to change.

NOTE

SurveyMonkey (www.surveymonkey.com) is a free, easy-to-use tool for creating your own web-based surveys.

8. Start again

We've said it before and we'll say it again – testing is not a once-off action, it's a constant process. Once you've run your test and implemented your solutions, your project can continue – but very soon you'll need to test again. Aim to run a test every time you reach a major new stage of the project, or add something that is brand new or has raised controversy in the team. Even after the project has gone live, there is space and reason to keep testing, iterating and optimising.

5.7 Tools of the trade

UX tools range from rudimentary (pen and paper) to highly sophisticated (web applications and tech tools). Here is a brief roundup of popular options.

Balsamiq (www.balsamiq.com) bills itself as a 'rapid wire-framing tool' and is great for creating fun, low-fidelity wireframes and simple prototypes. It works both as a web app and a desktop download, and has built-in features for collaborating with other team members.

Axure (www.axure.com) is an all-purpose prototyping tool that allows you to create fully interactive wire-framed websites without needing to code anything. A useful feature is that it also generates technical specifications for developers to work from, based on the interactions and links you create in the prototyping process.

Gliffy (www.gliffy.com) is a web-based tool that allows you to create a wide range of diagrams – everything from wireframes to sitemaps to charts. It offers a free version, with a paid Pro Account that offers more advanced features. While its strength lies in wire-framing, it also creates sitemaps, which means you could have several features in one place.

Morae (www.techsmith.com/morae.html) is a good place to start if you're looking for a web-based replacement for user labs. This innovative paid-for tool allows you to research users interacting directly with your, or a competitor's, website. The tool records video and audio of the user, and also captures their behaviour on the screen, so you can remotely watch exactly what they are doing and how they are reacting in person. The tool also allows you to prompt and interact with the user in real-time chat, track where they look on the screen, and more.

5.8 Case study: Rail Europe

5.8.1 One-liner

Rail Europe applied solid UX principles to overhaul their website and create an excellent user experience.

5.8.2 The problem

Rail Europe is a company that sells European rail tickets to American customers, helping them plan and book their railway arrangements before they travel.

In Europe, the rail network is comprehensive and frequently used. In the US, however, rail travel is uncommon and often unsatisfactory, so American customers are either unfamiliar with it (sparking uncertainty) or have likely had a negative experience, meaning they would be hesitant to try again.

The challenge was to create an experience that would resonate with US customers, provide them with accurate and useful information, and give them the confidence to book a railway journey. While Rail Europe already offered an advanced booking engine that covered 15 000 destinations, the key was to give customers a variety of flexible booking options, encourage them to actively explore, and to come out of the process feeling fully informed and confident.

5.8.3 The solution

Rail Europe engaged UX specialist agency Adaptive Path to recreate their website so that it would create the required experience.

Naturally, it was vital to understand the users and their unique needs, wants and concerns. The following information and research was collated:

- A prioritised list of information that was crucial for customers to make the correct booking
- Feedback from current website users and customers
- Usability barriers that Rail Europe had already identified
- Best practice guidelines and insights from other travel sites

Rather than launching directly into the website build, Adaptive Path took time during the concept stage to interrogate the data and hone in on what customers really needed. Their research process covered a series of conceptual phases:

1. They devised a user journey, corresponding to what 80% of Rail Europe customers would typically do, that flowed from the exploration stage (scheduling, planning) right through to booking and purchase.

2. From this, they identified key decision-making moments and information, which included dates, times, schedules and customer service.
3. They then developed a sequence of interactions that would lead customers through the booking and purchase process, ensuring that all the necessary information was visible and that the customer could easily move back and forward through the process.
4. Finally, Adaptive Path revised the interface to make sure its American audience had a seamless travel experience, taking factors such as travel times, connections, available amenities and correct seat bookings into account.

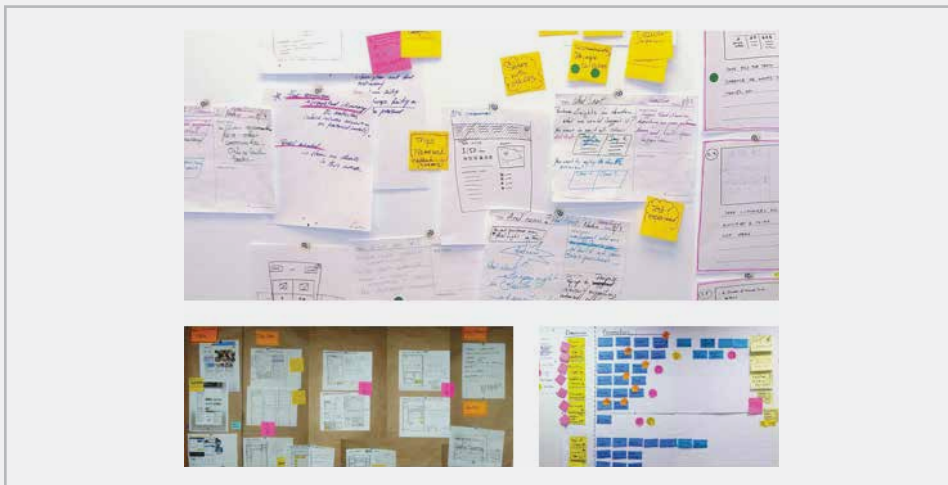


Figure 18. Rail Europe user research insights. (Source: Adaptive Path)

Once the final proposal was ready, Adaptive Path and Rail Europe worked together to refine and improve the model, taking both UX principles and specific customer knowledge into account.

5.8.4 The results

The new website was a hit with customers, who found it easier to book rail tickets. By giving customers confidence and taking the stress out of the process, Rail Europe could play an important role in making the overall travel experience more enjoyable.

After launching the website redesign, Rail Europe achieved a 3% conversion rate – the highest in its history, and impressive for an online booking site. It also found that certain badly performing products were now on an upward booking trend.

By the end of 2012, Rail Europe had become the number one online distributor of rail tickets, serving 900 000 customers that year. This indicates that good UX is not important just for short-term gains; it helps a brand build its reputation for professionalism, great service and reliability.

5.9 The bigger picture

UX touches on so many aspects of digital marketing that it's hard to list them all. It's involved right up front at the strategy and research phase, and then touches on all the Create disciplines – web development, design and copywriting.

It also helps make the most of Engage tactics by ensuring they are conceptualised with users in mind. For example, when it comes to search engine optimisation (SEO), Google introduced an update to its algorithm that would assess the UX design on a website as part of the overall decision on where to rank it. Matt Cutts, a Google Engineer, stated that: "We've heard complaints from users that if they click on a result and it's difficult to find the actual content, they aren't happy with the experience."

Social media, email marketing, display advertising, video marketing and other fields can also benefit from solid UX thinking – what do users want, need and expect from you on these channels?

Finally, UX goes hand in hand with web analytics data – both disciplines aim to understand users and create real, actionable insights from the data gathered about them. Quantitative and qualitative data make up the basis of sound UX thinking and decision making.

5.10 Summary

Users come first when creating any web-based marketing channels. Core UX principles such as user-centric design, web conventions, simplicity and credibility are essential for creating web experiences that are seamless, memorable and valuable to users.

Mobile UX is a special subset of the discipline that takes the unique context and characteristics of mobile users into account – whether for designing a mobi site, an app or a responsive website.

When it comes to implementing a UX process, the following steps should be followed:

1. **Identify business requirements** – what does the business need to get out of the site?
2. **Conduct user research** – who are you building the site for, and why? What information do they need? How will they move through the site?
3. **Create the basic structure** – what goes into a solid information architecture?
4. **Analyse and plan content** – how should content be put together here?
5. **Design the sitemap** – how will the overall website be structured?
6. **Build and develop the navigation** – how will users get to where they need to go?
7. **Create the layout** – what will each page look like, from top to bottom? What content is needed for this page to achieve its business goals?
8. **Add other useful elements** – how will CTAs, search tools and forms behave?

9. Conceptualise the visual design – how will the visual layer add to the overall UX impact?

10. Conduct user testing – are there any errors on our site, and is it easy to use?

5.11 Case study questions

1. Why was this project a considerable challenge from a UX perspective?
2. Why would it be important for a customer to move backwards and forwards through the booking process?
3. Find an example of an online booking process that you find frustrating, and explain why.

5.12 Chapter questions

1. Why is it so important to look at what the user needs from your website before considering any other factors?
2. Should the UX practitioner be involved at every step of the process when designing online experiences, tools and interactions? Why, or why not?
3. What sources can a UX practitioner turn to in order to gain user data? Are these limited to online sources only?

5.13 Further reading

www.smashingmagazine.com – Smashing Magazine posts regular, in-depth articles and research focused on UX, technology and web design.

<http://www.alistapart.com> - A List Apart provides insightful tips, advice and discussions on all things UX.

<http://www.lukew.com> - The blog of Luke Wroblewski, one of the world's foremost UX experts - it's filled with research and practical advice for working UX practitioners.

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Balsamiq Mockups

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Life's too short for bad software

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06

Web
Development
and Design

What's inside: This chapter introduces you to web design and designing for persuasion. It offers understanding of how web properties are built to be technically solid, user-friendly and in line with marketing goals. Following on from the UX lessons in the previous chapter, readers will learn about the **web development process**.

6.1 Introduction

Websites are, in many ways, at the heart of successful digital marketing. They are your home on the web, a shop window over which you have full control, and often the first place people stop to find out more about you.

Web development and design applies to more than just websites – the principles can be used for any digital assets you create, from mobile platforms to social media profiles.

Creating online assets involves three key processes – planning and design, which create the appearance, layout and style that users see, and development, which brings this imagery to life as a functioning web tool.

NOTE

Read more about this in the *Digital Marketing Strategy* chapter.

The fundamental principle of good development and design is to understand your users: the people who will actually be using and interacting with your website. What are they looking for? What are their objectives? Your offering must have user experience central to the process.

In this chapter, you will learn:

- How the web development process works, from planning through to design and launch.
- Development and design best practices and the principles of designing for persuasion.
- How to assess the quality and effectiveness of web development and design implemented by suppliers or agencies.
- How to evaluate the need for either a static or CMS website.

6.2 Key terms and concepts

Term	Definition
Above the fold	The content that appears on a screen without a user having to scroll.
Accessibility	The degree to which a website is available to users with physical challenges or technical limitations.
Alt text	The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. Also called Alt Tag.

Branding (or visual identity or corporate identity)	How your logo, colours and styling elements are translated from traditional print-based assets to digital.
Breadcrumbs	Links, usually on the top of the page, that indicate where a page is in the hierarchy of the website.
Call to Action	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today etc.).
Content Management System (CMS)	A system that allows an administrator to update the content of a website, so that a developer is not required to do so.
Common page elements	Items that appear on every page of a website.
Cascading Style Sheets (CSS)	A programming language that defines the styles (fonts, colours, etc.) used to display text and content. Web pages are one of the places that this language is used.
dpi	Dots per inch (in an image). On the web, the screen resolution is 72dpi.
Flash	Technology used to show video and animation on a website. It can be bandwidth heavy and unfriendly to search engine spiders.
HyperText Markup Language (HTML)	The code language predominantly used to create and display web pages and information online.
HTML5	A broad range of technologies that allow for rich media content and interaction on the scale of Adobe Flash, but which, unlike its counterpart, does not require additional third-party plugins. It allows rich multimedia content to be displayed that can easily be viewed by users, computers and devices. HTML5 is the next iteration of the HTML standard.
Information architecture	The way in which data and content are organised, structured and labelled to support usability.
Landing page	The page a user reaches when clicking on a paid or organic search engine listing. The pages that have the most success are those that match up as closely as possible with the user's search query.
Meta data	Information that can be entered about a web page and the elements on it to provide context and relevant information to search engines.
Native mobile application	A mobile application designed to run as a program on a specific device or mobile operating system.
Navigation	How a web user moves through a website, and the elements that assist the user in doing so.

Open source	Unlike proprietary software, open source software makes the source code available so that other developers can build applications for the software, or even improve on the software.
Proprietary software	Any software that one or more intellectual property holders own and licence to others in exchange for compensation, subject to certain restrictions. Licensees may not be able to change, share, sell or reverse engineer the software.
Robots.txt	A file written and stored in the root directory of a website that restricts search engine spiders from indexing certain pages of the website.
Search engine results page (SERP)	The actual results returned to the user based on their search query.
Sitemap	On a website, a page that links to every other page in the website, and displays these links organised according to the information hierarchy.
Universal Resource Locator (URL)	A web address that is unique to every page on the Internet.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
Web application framework	Software used to help create dynamic web properties more quickly. This is done through access to libraries of code for a specific language or languages and other automated or simplified processes that do not then need to be coded from scratch.
W3C	World Wide Web Consortium, which oversees the Web Standards project.
Web server	A computer or program that delivers web content to be viewed on the Internet.
eXtensible Markup Language (XML)	A standard used for creating structured documents.

6.3 Web design

Web design is the process of creating all the visual aspects of the interface. This covers the layout, colour scheme, images, logos, type, design elements (such as buttons and links), and anything else that you can see.

The web is a visual medium, so design is a very important part of creating successful assets that are both engaging and effective. At the same time, however,

designers need to keep in mind the technical aspects of design, as well as the all-important human factor. Digital properties shouldn't just be beautiful; they also need to create a good experience for the visitor and meet business objectives.

6.3.1 Visual identity and designing for persuasion

The visual interface – the design of a website – is what the user sees and interacts with. It's the visual representation of all the hard work that goes into developing a website. It's what the site will first be judged by, and is the initial step in creating a delightful user experience. In case you haven't realised it, it matters a lot.

There is a close relationship between UX and visual design – sometimes these are even done by the same person. At other times, the visual designer will use the documents created by the UX designer and add the visual skin. In this case, it's like comparing the architect (UX designer) to the interior decorator (visual designer).

Design is not just about aesthetics, although looks are very important. Design is about the visual clues we give users so that they know what to do next. Design is the way in which we communicate with our users. It assures web visitors of our credibility and ability to answer their questions, and turns them into customers.

Good interface design involves many things (including years of training and experience), but here are a few basic considerations. These are closely linked to UX and the visual designer plays a key role in defining them:

- **Navigation:** the signage of the site, indicating to users where they are and where they can go.
- **Layout:** how content is structured and displayed.
- **Headers:** the usually consistent top part of a web page.
- **Footers:** as you may have guessed, the usually consistent bottom part of the page.
- **Credibility:** telling users that you are who you say you are.

Visual identity

The visual identity answers the question: "How do users know it's us?"

Certain design elements should be carried through on all web assets created for a brand, as well as print and traditional communication media. Often, the visual identity guidelines for the web are codified into a Digital Style Guide document to ensure consistency across different agencies, designers and teams. This document can include guidelines for creating all manner of web assets, including banners, social media content, and website design elements.

The logo is the most prominent way to reinforce your brand identity on the website.

The logo is part of a brand's corporate identity (CI). Be aware that logos designed for printing on letterheads will need to be adapted for the web and legibility, particularly when it comes to resizing.

The primary font is typically used for prominent headings on the site, while body copy is often set in a standard web font that closely matches the primary font.

Font replacement is widespread and involves embedding non-web safe fonts into the code, using Typekit, for example. With Typekit, subscribers can embed simple code that allows them to choose from hundreds of fonts for their website (Wikipedia, 2013). However, the growing popularity of HTML5 in modern browsers makes font replacement less necessary.

Menu and button style, as well as icons, are also part of a site's visual identity. Even when a user is viewing a small part of a site or page, it should look as if it belongs to the site as whole.

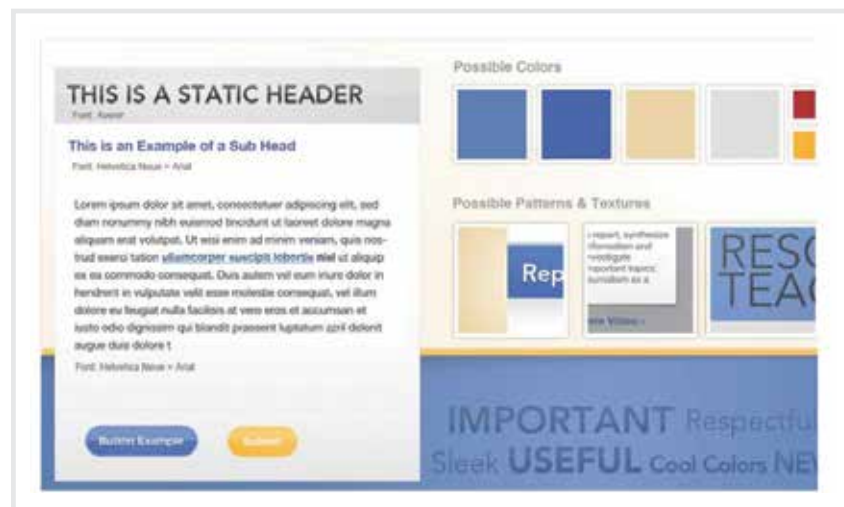


Figure 1. An example of a website's visual identity. (Source: Fisher, 2012)

6.3.2 Design theory

Design can be a pretty precise science – there is a lot of research out on what makes for effective design. A lot is also common sense and practice based on accepted web standards. Here are some concepts you should know.

The fold

The fold is the imaginary line at the bottom of the monitor that divides the immediately visible part of the website (content above the fold) from the part that is visible only after scrolling down (content below the fold).

Your most important message, content or Call to Action should usually be placed above the fold. It is worth mentioning here that the concept of above the fold has come across some scrutiny, because it is not always useful.

Consistency

Consistency in use of visual elements is vital to your online presence – across all your properties and channels (such as your email newsletter, Facebook page and mobi site) – as users do not perceive differences between platforms or even on- or offline. They perceive it as one message on multiple touchpoints. Within a website, elements should also be consistent. Colour coding, or colour themes, can be used very successfully to group areas or features on a website. For example, if the help button and help navigation are coloured yellow, then the user will quickly associate yellow with support and assistance. This is another useful shortcut to making the site usable and intuitive.

NOTE
Not every user will see the same amount of content above the fold, since some screens are smaller than others. Check your web analytics data to see what common screen sizes are used and tailor your content to the lower end of the spectrum to ensure that more people see your key message.

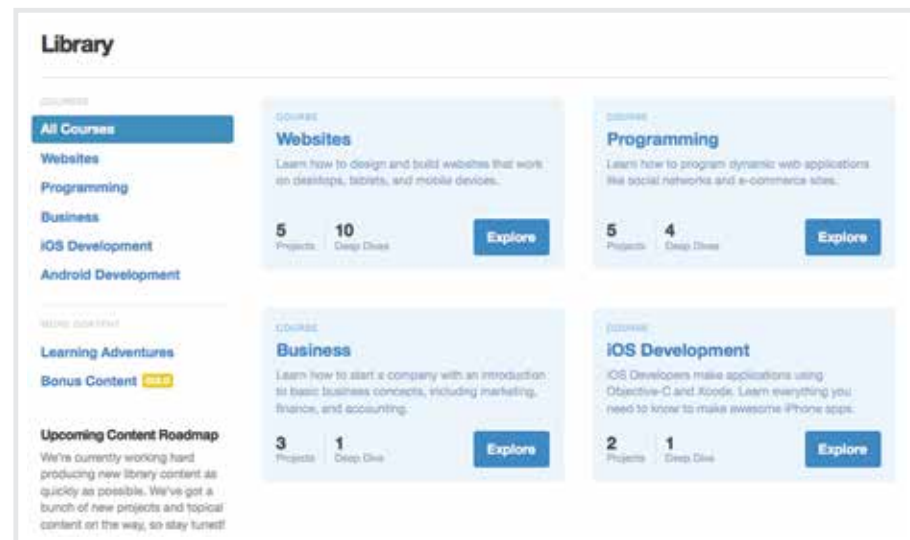


Figure 2. A website with a consistent colour scheme.

<http://teamtreehouse.com/library>

White space

Spacing on the page allows the eye to travel easily between chunks of information and allows scanning. This can be done by using what is called white space. This

space is not necessarily white, but instead is merely empty. It refers to the space between elements on a page.

Always steer clear of cluttered pages. This is especially true for landing pages, where a very specific message is expected. Make your pages as simple and easy to understand as possible.

If you look at the example below, you can see how detailed information can be simplified, which in this case led to a 14% increase in website visitors.

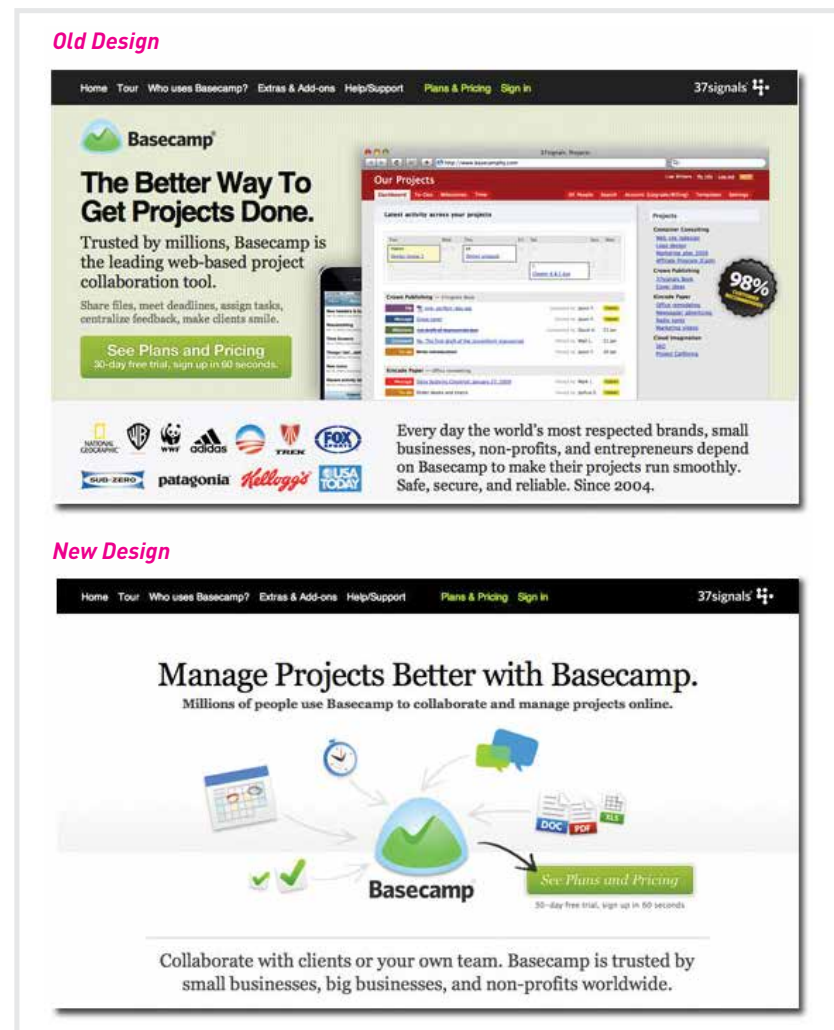


Figure 3. Putting your business’s message across more effectively. (Source: Moz, n.d.)

6.3.3 Colour theory

Colour has an incredible psychological effect on people. Based on our culture, preferences and learned cues, people interpret colours in very specific ways – and this can be used to inform and steer the user’s experience. Colour theory online refers to the principles of combining colours to attract people toward your brand and its offerings (Focus Designer, 2012).



NOTE
The colour wheel helps designers to find colours that work well together and create a colour scheme. Colours that appear opposite each other, like red and green, are known as complimentary colours. For example, red and green are often used for buttons that appear close together as the colours contrast and highlight each other.

Figure 4. A colour wheel shows how the colours red, yellow and blue appear when mixed together. (Source: Ibrahim, 2010)

Most of the colour choices will be dictated by the CI, but tones and shades will be selected by the designer.

Contrast is very important when displaying text online. If the text and background are the same colour and there is no contrast, this means that the text will not be readable. Best practice is to use a light background colour and a dark colour for the text. Black text on a white or light grey background works well. Contrast is also a good way to draw your reader to and differentiate between different aspects of the page.

Colours also hold different meanings and associations for people. Ensure that you know these meanings for the audience that you are targeting – for example, red signifies luck in Asian cultures, but danger in many western cultures.



Figure 5. What different colours signify for North Americans. (KISSmetrics, 2010)

There are some colour-related web design conventions you should follow:

- Red is used for warnings, error messages and problems.
- Green is used for successful actions, next steps and correct submissions.
- Blue is best used for hyperlinks.

Your Call to Action is one of the most important parts of your website and can be displayed as a link or button. As this is meant to attract the eye, choose a colour that stands out. When Dmix tested this out, as you can see in this example, they experienced an increase of 72% in conversions by using the more striking red button instead of the green one (Chopra, 2010).



Figure 6. Exploring the effectiveness of colour in buttons. (Source: Moz, n.d.)

6.3.4 Collecting and collating design assets

Elements such as your logo and brand colours represent your brand. The latest versions of these brand assets need to be available to the designer or marketing agency designing your website.

Getting the right brand assets to designers in a good-quality format that they can easily access saves time and avoids expensive mistakes. By doing this, your campaign won't be designed with the wrong version of your logo or with incorrect brand colours.

Here is a list of brand assets that a designer requires to start working on your project. The quality, format (or file type) and file size are all important considerations.

You need to provide:

- **Brand guidelines or style guide** in Adobe Reader (PDF) format.
- **Logo and other key brand elements.** These could be in Illustrator format (ai) or Photoshop format (psd). Best practice is to have your logo designed using vector graphics. If your logo or other brand assets are created in this format, they can be enlarged without losing quality. Other formats do not allow scaling and if displayed larger than the original designer intended will result in a poor-quality image. If you do not have a vector version of your logo available, then you should make sure that your image is at least 1 000 pixels wide.
- **Image libraries.** Photographs and images can be hosted online, where the designer can access them with a login. They can also be sent to the designer on a CD. Make sure the images are of sufficient quality. It is best practice to provide images that are 300dpi. This is the measure of a high-quality image that will retain its quality if resized. Although all images on the web are displayed at 72dpi, a higher quality image will give your designer room to optimise and resize and crop or cut images where needed.
- **Fonts folder.** You will need to provide both Apple Mac and PC versions of the fonts that are listed in your Style Guide. Many designers work on Macs, which use different font versions from those read by PCs.
- **Brand colours** need to be given to digital designers in RGB format. RGB stands for red, green and blue and is the standard for colours online.

NOTE

If you do not own the image and the copyright is not owned by you it is illegal to use the image on your site without permission from the owner. If you require images, these can be purchased from stock libraries online such as iStock or Shutterstock. Avoid using images from Google Image Search on your pages.

- Any **existing creative assets** that have been created for your brand over time such as:
 - Print designs
 - TV ads
- **Website copy** should be made available before the final design is required. This prevents delays caused by designers waiting for material.
- Any **additional assets** your designer may need that can be downloaded or sent, such as your price guides or product descriptions.

Fonts

Copy conveys your brand message to your client or customer and should be easy to read and search engine friendly. The CI is expressed through fonts, also known as typefaces.

Typographic layout can draw attention to the content users should see first. Indicate which pieces of information take precedence. Importance can be signified by text size, colour, weight, capitalisation and italics. Placement also contributes to how important text appears.

Some fonts are common to all computer users. These fonts are known as web-safe fonts. Anyone accessing websites that use these fonts will be able to view them as the designer intended and search engines will be able to search these websites easily. Fonts that are not web safe may appear very differently on some computers. Designers don't always like to be limited to using only web-safe fonts, and brand guidelines in most instances don't take web-safe fonts into account. This means that fonts must be embedded by a developer using tools such as Typekit, or alternative fonts need to be selected.

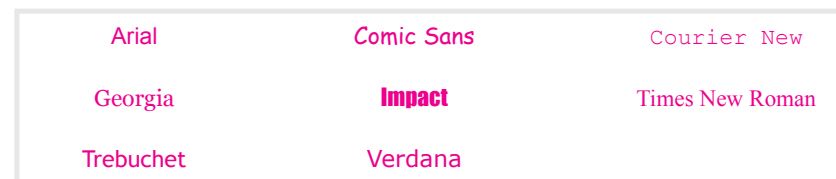


Figure 7. Examples of web-safe fonts.

Typographic layout can draw attention to the content users should see first. Indicate which pieces of information take precedence. Importance can be signified by text size, colour, weight, capitalisation and italics. Placement also contributes to how important text appears.

6.4 Web development

Web development is the process of taking finished web designs and transforming them into fully functioning, interactive websites. Development is what gives life and movement to the static designs, and enables users to access the website through their web browsers. This is done by translating the designs into web-coding languages that can be interpreted and displayed by web browsers.

Learning to code your own website is not in the scope of this textbook and requires years of practice and some considerable technical know-how. But we can teach you to understand the aspects that go into creating a website, the process that should be followed, and how to help in making key choices about your website.

When developing a website, you need to make three key decisions (don't worry, we'll explain each one below):

- Should your website be static or should it have a content management system (CMS)?
- Which server-side language should be used?
- Which front-end language should you use?

6.4.1 Static website or CMS

A static website, as the name implies, is one that does not change often – other than the occasional update, the website stays the same over time and no new content is added. Should new content be required, a web developer would need to add it.

CMS stands for content management system. A CMS is used to manage the content of a website. If a site is updated frequently and if people other than web developers need to update the content of a website, a CMS is used. Today, many sites are built on a CMS, which can also allow content of a website to be updated from any location in the world by signing into an online management interface for the CMS.

There are three types of CMS you can choose from:

- **Bespoke:** This is a CMS that is built specifically for a certain website, and many web-development companies build their own CMS that they use for their clients. This option is highly tailored and customised to your website, and can be more expensive than other options. It is also possibly less flexible.

NOTE

Some web-safe fonts are: Times New Roman; Arial; Helvetica; Courier New; and Lucida Console. See the full list here: http://www.w3schools.com/cssref/css_websafe_fonts.asp

NOTE

You can also use Google fonts as an alternative, which are more stylish than standard fonts but which are still viewable by most people. A developer will need to implement these. See www.google.com/fonts

- **Off the shelf:** A CMS can also be pre-built by an external company or developer. These can be bought like any other software on the market. While this may have fewer custom features, it's potentially a more cost-effective option than a bespoke CMS.
- **Open source:** There are many open source, pre-built CMS options available, some of which are free. Open source means that anyone can see the code that the CMS is built with, and can manipulate or improve it (and share this with everyone else using the CMS). An open-source CMS can be more rudimentary than paid options, but is also easy to tailor to your needs, and there is often a community that can create the solutions you need.

Some widely used open-source CMS solutions include:

- WordPress (www.wordpress.com)
- Joomla (www.joomla.org)
- Drupal (www.drupal.com)

A CMS should be selected with the goals and functions of the website in mind. A CMS needs to be able to scale along with the website and business that it supports, and not the other way round!

Of course, the CMS selected should result in a website that is search engine friendly. Here are some key features to look out for when selecting or building a CMS:

- **Meta and title tag customisation:** the CMS should allow you to enter your own meta tags for each page, as well as allow full customisation of title tags for each page.
- **URLs:** instead of using dynamic parameters, the CMS should allow for clean URLs by using server-side rewriting. Clean URLs consist only of the path to a webpage without extra code (a clean URL could look like this: <http://example.com/cats>, while an unclean URL could look like this: <http://example.com/index.php?page=cats>). It should allow for the creation of URLs that are:
 - static
 - rewritable
 - keyword rich

Be careful when building clean, descriptive and dynamic URLs from CMS content. Should you use a news heading ('Storm', in this example) as part of your URL (<http://www.site.com/cape/storm>) and someone changes the heading to 'Tornado' (<http://www.site.com/cape/tornado>), this will alter the URL and the search engines will index this as a new page, but with the same content as the URL which had the old heading. Bear this in mind before adding dynamic parameters to your URLs.

- **Customisable navigation:** a good CMS will allow flexibility when it comes to creating the information architecture for a website. For the purposes of adding additional content for search engines, a CMS should not require that all content pages be linked to from the home page navigation. This allows content to be added for search engine optimisation (SEO) purposes, without adding it to the main navigation.
- **The CMS needs to have good support** for managing SEO considerations such as URL rewriting and avoiding duplicate content issues.
- **Customisable image naming and alt tags for images:** a good CMS will allow you to create custom alt tags and title attributes.
- **Robots.txt management:** ensure that you are able to customise the robots.txt to your needs, or that this can at least be managed using the meta tags.

Finally, using a CMS that supports standards-compliant HTML and CSS is very important, as without it, inconsistencies may be rendered across various browsers. It also ensures faster loading time and reduced bandwidth, makes mark-up easier to maintain, supports SEO efforts and ensures that every visitor to a website, no matter what browser they are using, will be able to see everything on the website.

6.4.2 Server-side languages

Server-side languages are the 'hidden' web coding languages that determine how your website works and communicates with the web server and your computer. The most popular server-side framework for each language is also discussed.

When choosing a server-side language, you need to consider:

- **Cost:** The cost varies depending on the language you choose for your web development project, as the language chosen directly influences the salary of the developer. If information is processed where your website is housed, as opposed to on the client's computer, it increases the costs. Some languages also require on-going website management and maintenance, which is an additional cost to consider.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

NOTE

A web application framework (WAF) is software used to help create dynamic web properties more quickly. This is done by accessing libraries of code for a specific language and other automated or simplified processes that do not need to be coded from scratch.

- **Scalability:** When planning a project where scalability is a factor, consider whether there are developers readily available to develop in this language. Also find out if there are supporting libraries and frameworks available that suit your project.

Some of the most common and popular server-side languages include PHP, Java, Ruby and the .NET languages. Ask your web developer to advise you on the best language for your specific project.

6.4.3 Front-end languages

NOTE

There are many free resources online that teach you how to code. One is Codecademy: www.codecademy.com.

Web users have come to expect rich, interactive experiences online, and interactive website interfaces are a part of that. Front-end languages, or “client-side” languages, are languages that are interpreted and executed in the user’s browser rather than on the web server.

These experiences range from simple animations through to highly responsive interfaces that require input from the user. There are several technologies available to create such experiences, each with its own opportunities and challenges.

As with server-side languages, you need to consider a few properties of the front-end language you want to use. Bear in mind that server-side languages and front-end languages are often used together, as all web projects require front-end languages for development.

- **Cost:** Front-end language development costs are relatively low.
- **Features:** HTML, CSS and JavaScript are open source languages often used together and are compatible with most hardware and software. Content developed in these is also more search engine friendly. Flash is known for its video, animation and interactive multimedia capabilities. In many cases, similar results can be achieved with HTML, CSS and JavaScript. Flash can be used alone or in conjunction with other languages. What your end users will be able to view should always be the most important consideration.
- **Scalability:** Depending on the capabilities of the device executing the language, certain features may not be available or certain code may run too slowly to create a good user experience. The front-end code needs to take all the considered devices into account.

- **Browser and OS support:** With front-end languages, you have to cater for browser and operating system support. A website will look different on each browser and operating system and this needs to be factored in. If a feature cannot be displayed under certain conditions, work-arounds have to be implemented.
- **Open-source or proprietary software:** Any developer can create additions for or improve on open-source software, while proprietary software is owned and its use is restricted. It can be cheaper to develop in an open-source front-end language such as HTML, but as HTML is needed to host all web pages, combinations of the two are sometimes used. In most cases and for the languages we cover, however, this is not a major consideration.

There are several options to choose from when it comes to front-end languages, although the most popular by far are HTML, coupled with CSS and JavaScript.

HTML5

HTML is the language for creating websites and HTML5 is the fifth iteration of the language. It is also the name for a range of technologies that enable modern web browsing features. It’s a specification published by the web standards body (W3C) describing what features are available and how to use them. HTML5 is different from proprietary web software such as Adobe Flash in that the specification is the result of contributions from many organisations, and can be implemented by anyone without having to pay for royalties or licensing fees. You do, however, pay for the development tools provided by the companies.



Figure 8. The HTML5 logo.

HTML5 simplifies many common tasks when building a web page, such as including multimedia content, validating forms, caching information and capturing user input data such as date and time.

HTML5 allows browsers to play multimedia content without the use of Flash or a similar plug-in. There is also a technology called Canvas, which allows developers to create rich interactive experiences without the constraints that came with previous versions of HTML. For example, a 3D animated video can now be played – something that used to require the use of Flash or Silverlight.

The goal is a website that just works, without the need for particular browsers or plug-ins to enable certain functionality. To this end, having a standardised way of implementing common features means that the web is open and accessible to all, regardless of competency.

CSS

CSS stands for Cascading Style Sheets and is a style sheet language used to instruct the browser how to render the HTML code. For example, the plain text on a web page is included in the HTML code and CSS defines how it will appear. CSS can set many properties including the size, colour and spacing around the text, as well as the placement of images and other design-related items.

JavaScript

This is the most common client-side language used to create rich, dynamic web properties. Because it is an open-source language, many developers have added functionality that can be more quickly implemented. For example, there are over 1 000 different gallery systems created by JavaScript developers for JavaScript developers.

Flash

Adobe Flash is a language for creating rich, interactive experiences. It supports video, and is often used to create game-like web experiences. Although widely supported by desktop browsers, it has limited (and lessening) support on mobile devices, and is not usable on Apple devices such as the iPhone and iPad. It has a history of being problematic for SEO, although there are ways to work around much of this.

NOTE

Remember, mobile goes beyond just the mobile phone – also consider tablets, game consoles, netbooks and a range of other web-enabled devices.

6.5 Mobile development

Mobile Internet usage has increased dramatically in the last few years and, according to the *Washington Post*, is predicted to continue increasing by 66% globally each year (Kang, 2013).

Because of this, it's important for all brands to make themselves accessible on mobile devices. As you learnt in the *User Experience Design* chapter, mobile devices can fall into a range of categories.

Developing for the mobile phone requires an understanding of the opportunities and challenges presented by mobile technology. Challenges include the obvious, such as a smaller screen and navigation limitations, as well as more complex issues such as file formats.

6.5.1 Which mobile experience should you create?

When creating a platform for mobile users to access your content and brand, you have three options:

1. **Mobile website**
2. **Mobile application**
3. **Responsive website**

Mobile websites make it possible for users to access information about your brand on the move wherever they may be, as long as their phone has a browser and an Internet connection.

Mobile websites need to be designed with the mobile device in mind. Mobile website interfaces demand a simpler approach, and a consideration of screen size and input method.

A native mobile app is software designed to help users perform particular tasks. Examples include a tool for checking the weather, a fuel calculator or a recipe index.

Mobile apps can be sold, or made available for free. There are many developers who create apps in order to derive an income, while free apps that offer users value are often sponsored by brands or advertising. An app can be an excellent tool for connecting with your customer.

The key difference between native applications and mobile websites is that websites can be accessed using any Internet-enabled mobile device, while applications are designed for particular handsets and operating systems and have to be downloaded to the mobile device. That said, mobile apps generally allow for more integration with the device and hence a better user experience, depending on the complexity of the functionality.

NOTE

Read more about this in the *User Experience Design* chapter.

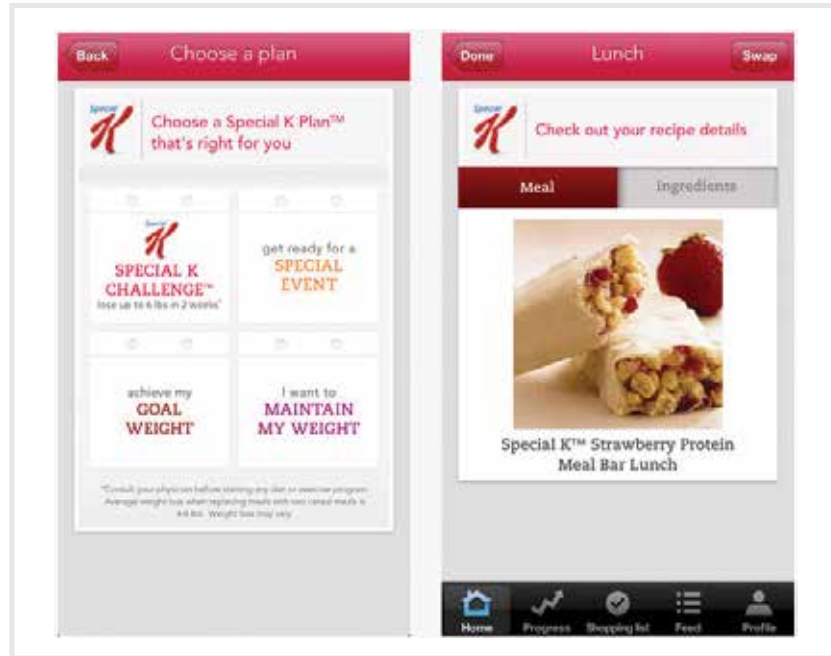


Figure 9. An example of a branded app from the iTunes App Store.

Should you wish to target Apple and BlackBerry users, for example, you will need to create two different applications or focus on making a cross-platform application – something that can be difficult and expensive.

It is a good idea to focus on mobile sites when targeting a broader group and building an application when wanting to reach a niche or targeted audience.

NOTE

Open a responsive website in your browser. Now use a tool like www.resizemybrowser.com to change the size of the window and see how the website responds in real time.

A responsive website is a website that changes its layout depending on the device it is displayed on – it looks one way on a desktop computer, but then adapts to the smaller screen size and layout on a tablet or mobile phone. In this way, a single development project can cater for multiple device form factors.

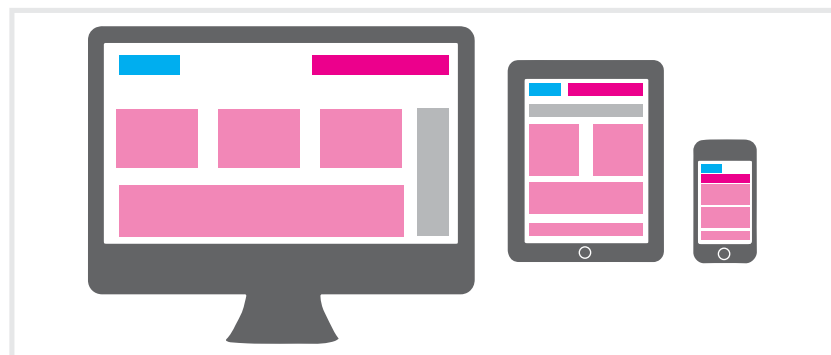


Figure 10. Elements shift and rearrange on a responsive website.

Creating a responsive website means you only need to build one website for the full range of devices, from desktop to mobile. This can be a technically challenging exercise and will require a lot of planning upfront to make sure that the site displays correctly on each device.

Here is a table that compares the relative strengths and weaknesses of each option. There's no right or wrong answer on which one to pick – choose the option that suits your brand, target audience and digital objectives best.

	Strengths	Weaknesses
Mobi site	<ul style="list-style-type: none"> Accessible from any web-enabled phone Generally the simplest, cheapest and quickest option to develop Easy to use Can link to content within and outside of the site and reap the SEO benefits 	<ul style="list-style-type: none"> Limited functionality Uses a separate code base from the full website
Native app	<ul style="list-style-type: none"> Versatile and creative tools can be created Interactive and fun Can create real added value through innovative approaches not possible via a web browser Ideal for frequently repeated or routine tasks Promote brand loyalty Enables access to core phone functions such as GPS, accelerometer, camera, etc. Could generate income as a 'paid application' Performance benefit in some cases 	<ul style="list-style-type: none"> Doesn't work on feature phones Different versions needed for different phone makes and models Entirely different and complex development process User needs to choose to download them Users without additional phone storage may not have enough space to install the app All apps must go through formal app stores, and need to be approved in some instances Changes need to be released through version updates
Responsive site	<ul style="list-style-type: none"> Technically elegant and device-'agnostic' solution One consistent site accessible across many devices One data set to work from Future-proof option that will work on most new devices 	<ul style="list-style-type: none"> Could be complex to develop Site needs a lowest common denominator approach to cater for all devices May not work correctly on all sizes and shapes of devices No agreed standard way yet to develop responsive sites

We will look at mobile sites now and return to responsive sites in more detail later.

6.5.2 Designing a mobile site

Designing a site that will display consistently across multiple handsets is difficult, but understanding and sticking to web standards will bring you closer to this goal.

Design your site so that the information your users want is not only on display, but also easy to get to. The limited screen space is valuable, so you can't necessarily have the full site navigation on every page. The information architecture of your site is therefore essential to ensuring you make the most logical use of navigation in line with what your site visitors need. There are benefits to mobile development that can help you get around this.

Standards

There are few mobile standards currently in place. Creating content (including images, text and beyond) that can be correctly formatted on most phones (or at least legible on phones where formatting is flawed) is still not entirely possible. There is therefore a certain amount of trial and error involved in designing a mobile site. The process is certainly worth it, though, considering that there are 3.4 billion unique mobile phones, and a fair number of these are accessing the mobile web (International Telecommunication Union, 2013).

Mobile handset emulators allow you to see how your work-in-progress website will be formatted, depending on which device you are emulating. It has been suggested that nothing can replace testing on actual mobile devices, so if you are doing the testing, recruit contacts with different handsets to show you the difference in display.

Some emulators:

- Test iPhone – www.testiphone.com
- BlackBerry – www.blackberry.com/developers/downloads/simulators
- Mobile Phone Emulator – for Samsung, iPhone, BlackBerry and others – www.mobilephoneemulator.com

6.5.3 Responsive design

Responsive websites are designed for a range of screen widths. When deciding whether to create a responsive site or separate mobi and desktop sites, consider your customer first:

- **How much of your website traffic comes from (specific) mobile devices? If this is a large percentage, consider building a dedicated mobile site. Bear in mind that the popularity of particular mobile devices can change quickly as consumer preferences evolve.**

- **Do your desktop users have the same goals as your mobile users? If your mobile consumer's goals are very different, then you may want to consider building a separate mobile site.**
- **What is your budget and how quickly do you need your website to be built? Responsive websites take longer to build and can be more expensive. You could save money long term by going this route, but there is a sizeable upfront investment.**
- **Do you have an existing site, and can it be converted into a responsive website, or will it need to be rebuilt (Du Plessis, 2012)?**

Responsive design comes with a fair bit of terminology, but there are three key concepts with which you should be familiar.

Flexible grid

Typical websites are designed as a large, centred, fixed-width block. With responsive design, the page elements (the heading; the text or copy; the main image; and other blocks of information) are arranged in a grid of columns that have predefined spacing. Each element relates proportionally to the other elements. This allows elements to rearrange or resize in relation to each other whether the screen is tiny or huge and the screen quality is high or low. Although this system allows for flexibility, an extremely narrow screen can cause the design to break down. In this case we can make use of media queries.

Media queries

Media queries are bits of code that allow websites to ask devices for information about themselves. It then selects the website style that will suit the device best from a list of styles defined in a CSS. Media queries ask for information about the device's browser window size, orientation (landscape or portrait) and screen display quality.

Flexible images

Images are designed to move and scale with the flexible grid. How fast the website loads is an important consideration, so high-quality images are made available for larger screens and lower-resolution images are made available for smaller screens, according to the information received from the media query. Parts of images can also be displayed for smaller screens to maintain image quality. Images can even be hidden completely.

NOTE

Is responsive design right for your company or client? See how companies tackled this question here: www.zdnet.com/does-your-companys-web-site-need-responsive-design-7000021417

6.6 Step-by-step guide to building a website

This section discusses the process of building a website from the client's perspective. There are different approaches to building a website. The one described here is the waterfall process, where one step follows the other. This is in contrast with other methods such as the Agile methodology, which involves faster iteration and greater collaboration, but doesn't afford clients as much control and upfront clarity on the deliverables and timelines.

Step 1: Planning and research

Planning a website starts with research: your market, your users, your competitors and your business. If you already have a website, you can use existing web analytics data to understand how well you are meeting your users' needs. It's also worth running some user labs to watch how users interact with your existing site. Have a look at the *Market Research* chapter for a detailed discussion of this.

NOTE

Read more about this in the *Market Research* chapter.

Key questions you need to ask:

- **Business:** What are your business objectives? How should this digital property help you to achieve those objectives? (For example, should it generate leads for you to follow up on? Is it an eCommerce store?)
- **Users:** Who are your users, your potential customers? What problem does your website need to help them solve? (For example, collate travel information in one place, such as with www.tripit.com.)

This research helps you to plan your website strategically, ensuring that it is aligned with both user needs and business objectives.

In research and planning, you should also reach an understanding of what tasks (or actions) users need to do on your website. These are usually in line with your business objectives. Some tasks a user may need to do include checking the availability of a hotel, signing up to a newsletter, or printing information.

Step 2: Choosing a domain name

Domain names are important. They are part of the URL of a website.

A domain name looks something like this:

www.mycompany.com

But a lot more information can be included in this. Domain names can carry the following information:

[subdomain.domain.tld/directory](#)

- **Domain** – the registered domain name of the website
- **Subdomain** – a domain that is part of a larger domain
- **TLD** – the top level domain, uppermost in the hierarchy of domain names
- **directory** – a folder to organise content

The **TLD** can indicate the country in which a domain is registered, and can also give information about the nature of the domain.

- **.com** – the most common TLD
- **.co.za, .co.uk, .com.au** – these TLDs give country information
- **.org** – used by non-profit organisations
- **.gov** – used by governments
- **.ac** – used by academic institutions

Domain names must be registered and in most cases there is a fee for doing so. Many hosting providers will register domain names on your behalf, but you can also do it yourself.

Domain names should be easy to remember, and if possible, include important search keywords for your business. For example, if you were building a website for your restaurant named Omega, www.omegarestaurant.com could be a better choice than www.omega.com as it contains the important keyword 'restaurant'.

Step 3: UX and content strategy

You also need to gather, analyse and map out what content is needed on the website. This content is then structured in a process called information architecture. A sitemap should reflect the hierarchy of content on the website, and navigation (how users make their way through a website).

NOTE

Read more about this in the *User Experience Design* chapter.

Before a website is designed and developed, it should be sketched out using wireframes. These should then be reviewed by everyone involved in the web design and development project to make sure that they are feasible, as well as to identify new ideas or approaches for design and development. It's much easier to change track in the planning and research phase than down the line when design and development have started.

NOTE

Have a look at the discussion on choosing a static versus a CMS website earlier in this chapter.

At the same time, consider what content you want to include on your site – will it be a relatively static site that doesn't change often, or will you need an editable CMS to regularly add and update content, such as blog posts, images and products?

Should the website be large enough to require it, a functional specification document should be created, using all the information compiled so far. This document details the development requirements for the website, and can be used to communicate any specific design constraints.

It's now time to move on from planning to building.

Step 4: Search engine visibility

Search engine traffic is vital to a website; without it, chances are that the site will never fulfil its marketing functions. It is essential that the search engines can see the entire publicly visible website, index it fully, and consider it relevant for its chosen keywords.

Search engine optimisation (SEO) has its own chapter in this textbook, but here are the key considerations when it comes to web development and design.

The *Writing for Digital* and *Search Engine Optimisation* chapters provide details on writing copy for online use and for SEO benefit. When it comes to web development, the copy that is shown on the web page needs to be kept separate from the code that tells the browser how to display the web page. This means that the search engine spider will be able to discern easily what content is to be read (and therefore scanned by the spider) and what text is an instruction to the browser. Cascading style sheets (CSS) can take care of that.

The following text styles cannot be indexed fully by search engines:

- Text embedded in a Java Applet or a Macromedia Flash File
- Text in an image file (that's why you need descriptive alt tags and title attributes)
- Text accessible only after submitting a form, logging in, etc.
- Text accessible only after JavaScript on the page has executed

If the search engine cannot see the text on the page, it means that it cannot crawl and index that page.

Step 5: Design

Design happens before development. According to the steps explained earlier in this chapter, the designer will transform the wireframes and basic planning materials into beautifully designed layouts – these are static images that show how the website will look once it's coded.

Step 6: Development

The development phase usually kicks in once the design is finished, although developers will sometimes start their involvement as early as the wireframe stage by creating low-fidelity prototypes to support the user-testing process. Normally, the developer uses the design templates to code the actual website, using the front-end language that you have chosen. Server-side development and CMS considerations may also be part of this phase.

Step 7: Testing and launch

Having planned an amazing site, designed it beautifully, built it skilfully and filled it with fantastic copy, it's time to test it fully and then take it live!

Testing is an important part of website development and design, and it should take place throughout the process of planning, designing and building, leaving just final quality assurance (QA) testing before the site goes live. Test subjects should be real potential users of the website, not just members of the development team!

The site needs to be tested in all common browsers to make sure that it looks and works as it should across all of them. All links should be tested to make sure that they work correctly, and it's always a good idea to get a final check of all the copy before it goes live.

Tools such as W3C's HTML validator (validator.w3.org) should be used to validate your HTML.

Make sure your web analytics tracking tags are in place, after which it will be time to take your site live. Now, you need to move on to driving traffic to your newly launched site – that's where all the Engage tactics in this textbook come in handy.

NOTE

Read more about this in the *Data Analytics* chapter.

6.7 Case study – The Boston Globe

6.7.1 One-line summary

BostonGlobe.com invests in a responsive design website to enable readers to enjoy their site via various devices.

6.7.2 The problem

The Boston Globe is an American daily newspaper and needed a website that would be viewable and usable on a range of devices. They turned to Upstatement, editorial designers who specialise in websites and applications, to assist them in solving this problem (Bottitta, 2012).

6.7.3 The solution

Upstatement decided to build a responsive site for Boston Globe, to cater to all the devices on which their target market would be viewing the site.

Before this website could be built, there were some key decisions that needed to be made. Among a few other considerations, the project leaders needed to establish the various breakpoints. Breakpoints are the points at which the device screen is too narrow or wide to display the site optimally. Once identified, the elements that needed to change at each of these breakpoints could be accounted for and a smooth user experience could be created (Bottitta, 2012).

Which breakpoints and screen widths to design for

Upstatement had some big questions to answer before they could start the design process. Some of these were:

- What are the key breakpoints?
- What do major templates look like at each breakpoint?
- What do the header and footer look like?
- What content appears on the home page, various section fronts, and article page?
- What's the overall look and feel? (Bottitta, 2012)

In order to identify the breakpoints, a variety of available devices were looked at: PCs, laptops, tablets, smartphones and dumb phones were among these. Upstatement identified six breakpoints. Some of these were specifically for smartphones and the iPad (Bottitta, 2012).

The following breakpoints were selected:

- 1 200px
- 960px
- 768px
- 600px
- 480px
- 320px

Key pages were then designed to accommodate these different widths (Bottitta, 2012).

The process

Designing with mobile in mind first is a well-supported school of thought, but this team designed with the desktop in mind first, at least for the design phase. They found it easier to design this way since most content fits in the desktop version. The design was then simplified for smaller screens. In the coding stage, the mobile first approach was used. They found this worked well and used it in their subsequent projects (Bottitta, 2012).

Designing for desktop is the most complex, since most elements are included, but it is also easier to design for, since the elements are all likely to fit in. Different breakpoints were looked at throughout the design process, with the mobile breakpoints providing the greatest insight. Given the limited screen size provided by mobile phones, tough decisions had to be made about which elements were the most important to display. Simplicity was a key theme in this design process, with the question constantly asked being, 'what's absolutely necessary and how I can simplify?' (Bottitta, 2012).

Which elements need to change to accommodate the next breakpoint?

In order to illustrate some of the decisions made in this process, the design of the header element of the *The Boston Globe* website will be discussed in more detail. Above the navigation bar, the logo, search bar and weather information needed to be displayed. The user's account information also needed to be accessed here. Another important element was 'My Saved List', where users could 'bookmark' site contents (Bottitta, 2012).

Designing for 960px

Once the design elements were determined, all the header elements fitted well for this breakpoint and scaled to the larger screen size of 1 200px. A large dropdown enabled each subsection to be included, where top stories and subcategories could easily be found (Bottitta, 2012).



Figure 11. BostonGlobe.com at a 960px screen size.

Designing for 768px

When designing for the smaller screen size of 768px, header elements that had previously fitted no longer did. To solve this, they looked at what could be excluded. 'Home' couldn't be excluded, and menu items couldn't be shortened and stay meaningful (Bottitta, 2012).

As a solution, 'My Saved List' was moved from the navigation to save space (Bottitta, 2012).

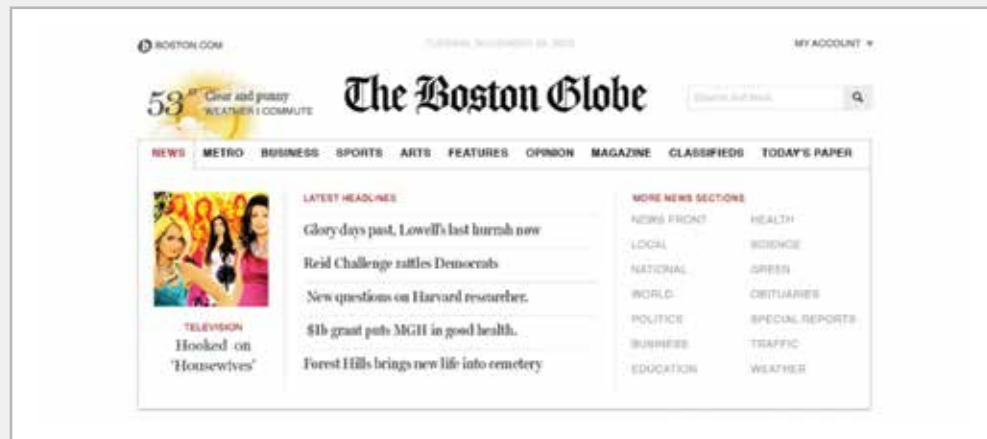


Figure 12. BostonGlobe.com at a 768px screen size.

Designing for 600px

Once again, fewer elements fit in at this breakpoint. The large dropdown was the first element to be excluded. Search, however, is a key element and had to remain, while individual sections were slotted into a section called 'Sections'. 'Today's Paper' and 'My Saved List', although also sections, were important enough to promote individually and so kept their spots (Bottitta, 2012).



Figure 13. BostonGlobe.com at a 600px screen size.

Designing for 480px

This breakpoint signified the first significant design change to accommodate the mobile landscape view. To accommodate all the elements in this view, the weather was positioned above the logo. This was done to ensure that there was space for the other website elements on the home screen.

The 'Today's Paper' section was included in the 'Sections' dropdown to save space, and the search box became an icon which expands to an input box when the user needs it (Bottitta, 2012).



Figure 14. BostonGlobe.com at a 480px screen size.

Designing for 320px

With more vertical space in this view, the weather, logo and navigation bar all appear underneath each other. Things were also simplified through code, with all the menus using the same style (Bottitta, 2012).

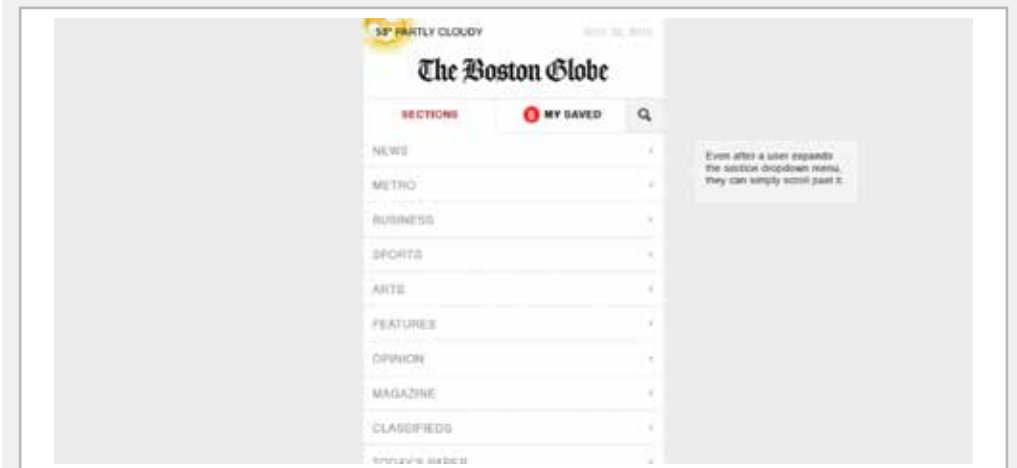


Figure 15. BostonGlobe.com at a 320px screen size.

What do we need to solve in the coding process?

Not all screen needs and interactive states can be planned out in the design process. In the coding process these gaps need to be filled in. It is also faster to solve some problems in the coding stage. For this reason it's beneficial to start coding when the major design decisions have been made (Bottitta, 2012).

6.7.4 The results

This resulted in an effective and usable design for a variety of devices (Bottitta, 2012).

6.8 The bigger picture

Web development and design can be seen as the thread that holds digital marketing together. After all, websites are the first thing we think of when talking about the Internet.

With the crucial role that search engines play in the way in which people explore the Internet, web development and design go hand in hand with SEO. And, of course, online advertising campaigns, social media channels, email marketing newsletters and even affiliate programs lead people to click through to your website, and sometimes to a customised landing page. That's the web design jumping into the mix again.

Setting up analytics correctly on your website is also essential to managing and monitoring your marketing success.

Successful website development and design is all about the right preparation, and the resulting website usually forms the foundation of any digital marketing to follow. Make sure you understand your users' needs, and you're building on a strong base.

6.9 Summary

Successful websites come from strong planning with a focus on user needs. Websites should be built to be accessible and usable, search engine optimised and shareable.

Key considerations include:

- Designing your website according to best practices following the process of getting a website developed from start to finish
- Developing a strong, stable and usable website
- Creating a suitable mobile web experience for your users
- Enhancing user experience through design and guiding a visitor seamlessly through a website, as opposed to distracting visitors from their goals
- Ensuring consistency in visual messaging across all properties
- Supporting a wide range of web browsers and mobile devices

6.10 Case study questions

1. When deciding on breakpoints, what popular devices were considered and have these changed?
2. Constantly simplifying the design is important as screen size decreases. What should you ask yourself about the user in order to make these decisions?
3. Why would designing and coding with a mobile first or desktop first approach be beneficial?

6.11 Chapter questions

1. What is an XML sitemap?
2. Which is more important in web design – functionality or look and feel?
3. What role does a website play in an overall digital marketing strategy?

6.12 Further reading

www.alistapart.com – a website for people who make websites, A List Apart has regular articles from web designers and developers on building user-friendly, standards-compliant websites

html5weekly.com – a weekly newsletter filled with the latest must-know HTML5 tips and trends

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07

Writing for Digital

What's inside: An introduction to writing for digital reveals that content is king, and gives you the **key terms and concepts** needed for this chapter. **How it works** discusses **personas**, the importance of **layout**, and some **HTML basics**. If you are writing online, you will need to look at **short copy**, which includes the all-important **Call to Action** features and benefits, and writing **search adverts**. **Long copy** still requires attention to the elements that make sure you are **read**, and we look at the all-important **SEO copywriting**. The web is full of **neologisms and buzzwords**, but you'll keep on top of them with our **tools of the trade**.

7.1 Introduction

Online copy is a hardworking multi-tasker. It must provide information to visitors, engage with them, convince them to take a desired action and, all the while, convey brand ethos. It also has to provide context and relevance to search engines. It needs to achieve all this without making it look as if the author is trying too hard.

You will see in this chapter that writing for digital is different from writing for more traditional media. Because of the sheer volume of information on the Internet, quality content is king – many people argue that it is one of the most significant determinants of the success of your online campaigns. Considering it is one of the most direct lines of communication with your consumers, this is not surprising. Therefore, you will see many links between this chapter and the chapter on *Content Marketing Strategy*.

NOTE

Read more about this in the *Content Marketing Strategy* chapter.

Online copywriting involves everything from the text on a website to the subject line of an email, and all things in between. From PR articles of 800 words to four-line search adverts, if it's being read on a screen, it's online copy.

Writing for digital does not mean the traditional rules of writing need to be abandoned. By and large, the foundations remain.

In this chapter, you will learn:

- The principles of writing for your web audience
- Which types of web copy are available to you
- The basics of HTML for formatting online text
- How to write for search engine optimisation (SEO), focusing specifically on keywords
- The best practices for successful online copywriting

7.2 Key terms and concepts

Term	Definition
Above the fold	The content that appears on a screen without a user having to scroll.
Active verb	A word that conveys action or behaviour, and in a Call to Action, tells a reader what to do.
Audience	The group of people at which a marketing communication is targeted.

Benefit	The positive outcome for a user that a feature provides.
Call to Action (CTA)	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today, etc.).
Dynamic keyword insertion	In paid search advertising, this allows keywords used in searches to be inserted automatically into advert copy.
Feature	A prominent aspect of a product that is beneficial to users.
HyperText Markup Language (HTML)	Code used to structure the information and features within a web page.
Keyword stuffing	The process of putting too many keywords into the meta data of the website or using many irrelevant keywords. Search engines can penalise websites using this practice.
Mass customisation	Tailoring content for many individuals.
Meta data	Information that can be entered about a web page and the elements on it in order to provide context and relevant information to search engines.
Persona	A character created to define a group of readers in order to speak to them as though they were a unique reader.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click of the advert.
Sender alias	The name that is chosen to appear in the sender or 'from' field of an email.
Search engine optimisation (SEO)	The process of improving website rankings on search engine results pages.
Search engine results page (SERP)	The actual results returned to the user based on their search query.
Tone of voice	The register, formality and personality that comes through in the text.
Unique selling point (USP)	The aspect that makes your offering different from your competitors'.

7.3 Writing for your audience

One of the assumptions you can make about writing is that it is done for an audience. In marketing and advertising, knowing your audience is vital: it will guide you in developing your content strategy, determining the topics they are interested in, and help you organise information in a way that makes sense to them. It will direct how you express your copy for your audience.

Ultimately, understanding who you are writing for will ensure that you are able to communicate your message to them and thereby increase the likelihood that your copy will achieve the desired result.

Step one of writing for digital is to ensure you have researched your audience and understand what they want. Once you have a clear idea about this, you can figure out how to fulfil those needs using your copy.

Holly Buchanan of *Future Now* (Buchanan, 2008) summarises this with three questions you should ask:

1. Who is my audience?
2. What actions do I want them to take?
3. What information do they need in order to feel confident taking action?

When you are researching your audience, there are two useful concepts to bear in mind: the audience of one, and personas.

7.3.1 The audience of one

According to Price and Price, audiences were traditionally thought of as a vast and vaguely defined crowd (Price & Price, 2002). Because the web provides a voice to individuals and niche groups, the concept of this mass audience is disintegrating.

Price and Price go on to argue that the Internet has led to an audience of one (Price & Price, 2002). What does this mean? While your audience is not literally one person (and if it is, thank your mum for reading your copy, but spend some time growing your readership), it is not a vast, vaguely defined crowd either. Instead, the web has many niche audiences who are used to being addressed as individuals.

When you are writing marketing material, you need to identify that 'individual', investigate what he or she wants, and write as if you are speaking directly to him or her. The individual that you have in mind when you are writing could also be called a persona.

7.3.2 Personas

A persona is a profile that a writer creates to embody the characteristics of the target audience for whom he or she is writing.

Personas are based on the profile of readers of your copy. Creating a profile is all about considering the characteristics of your readers and their needs and

desires. When you are building this profile, there are a number of things that you should consider about your audience:

- Are they primarily male, female or a mixture?
- How old are they?
- What are their other demographics and psychographics?

Once you understand these simple characteristics, you can ask yourself some more in-depth questions. If you are selling something, questions include:

- How do they make purchasing decisions?
- Do they compare many service providers before selecting one?
- Do they make lists of questions and call in for assistance with decision making, or do they make purchase decisions spontaneously based on a special offer?

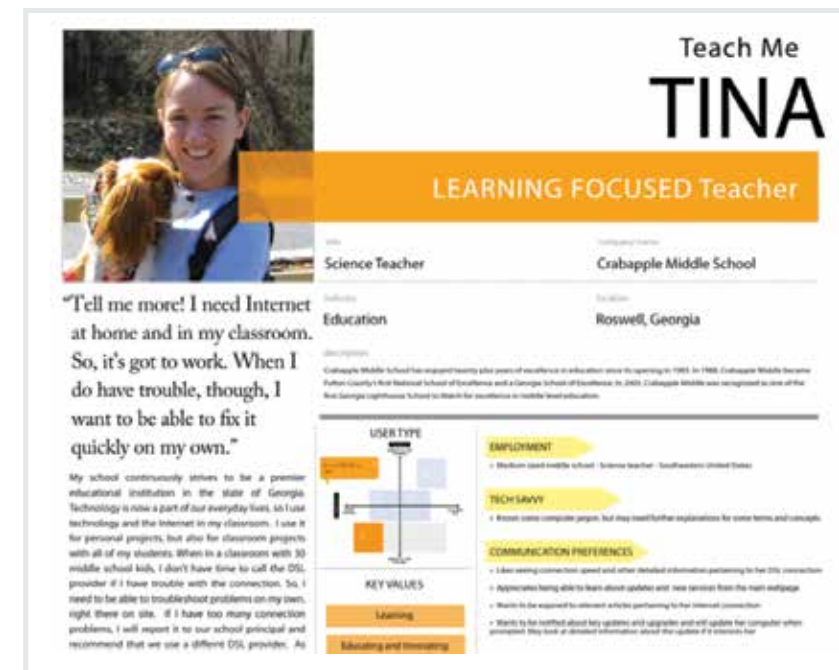


Figure 1. A sample persona. (Source: UXmag)

Understanding the reader profiles of your readers is an important process, and the best copy usually results from extensive time spent figuring out your audience.

Tailoring your copy to your audience does not necessarily limit you to one persona. Digital copy can be structured so that it caters for several personas. Also consider

that your various marketing channels may have different audiences, so ensure that you have a persona for each main platform you use. However, you need to spend time understanding their needs before you are able to write copy that addresses these personas.

7.4 Types of web copy

Whether it is long or short, the purpose of content is to communicate a message. Communication implies that the message has been both received and understood. The considerations covered here are aimed at ensuring that when you distribute a message, it is communicated effectively to the people who need to receive it.

In order to communicate the intended message effectively, content needs to be:

- Clear and concise
- Easy to read
- Well written
- Well structured

Content written for the web can be divided into two broad categories: short copy and long copy. The division is by no means scientific.

7.4.1 Short copy

On the web, writers often have very little time and space to get a message across to a visitor, and entice them to take action. This is especially true of banner and search adverts, but is also important across all digital marketing disciplines. Probably the most important short copy anywhere is the Call to Action.

Call to Action

Users scan web pages and look for clues on what to do. Tell them. A Call to Action is a short, descriptive instruction that explicitly tells a reader what to do (for example, 'Click here' or 'Buy this now'). Any time there is an action you want a reader to take, a Call to Action should instruct them on what to do. This means using active verbs when you write, and crafting hyperlinks to be clear instructions that resonate with your visitors at each step in the conversion process.

Banner advertising involves clear Calls to Action, and they can also be used in social media posts, search adverts, content marketing and more. Call to Action copy is not limited to short copy: email newsletters and promotions should also make use of Calls to Action, and we even see them all over web pages.

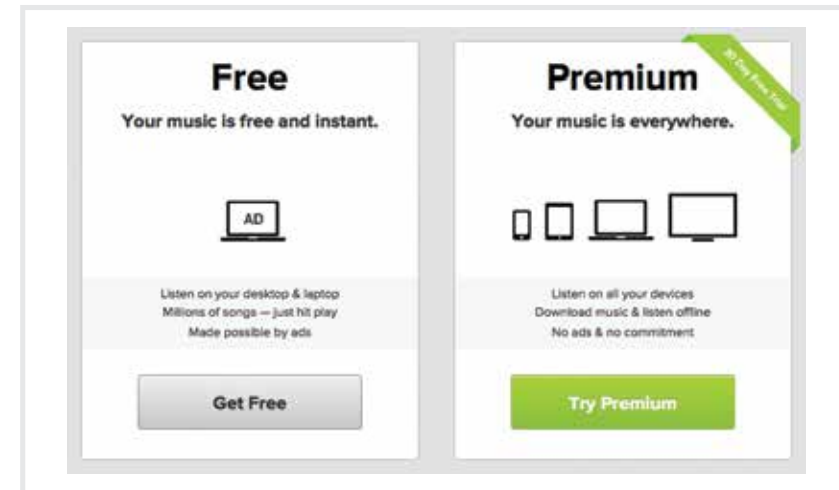


Figure 2. CTAs should be clear and enticing.

A good Call to Action resonates with the action the visitor needs to take, as opposed to the technical function that is performed. For example, if a user has entered an email address to sign up to your email newsletter, the action button should say 'Sign up' and not 'Submit'.

Also consider what actions mean offline. For an email newsletter, 'Sign up' can have very different connotations from 'Subscribe'. Furthermore, 'Subscribe' is very different from 'Subscribe for free'. Whereas subscriptions have connotations of costs, 'Sign up' does not carry the same burden. However, 'Subscribe for free' could imply greater value – something that would normally carry a cost is available to you for free.

NOTE

Since the Call to Action is key to converting customers, this is an important element to test. What iterations of your main Call to Action could you try?



Figure 3. Good CTAs are short and to the point.

NOTE**Titles and subject lines**

Titles and subject lines often form part of a body of long copy. However, they are important enough to be discussed as stand-alone short copy. Titles and subject lines are there for a very important reason: they tell a reader whether or not they should read further. They are the gateway to your content.

Consider the following titles:

- [Guide to online copywriting](#)
- [Ten steps to online copywriting that sells](#)

The second title conveys more information and excitement to the reader, which helps the reader to make a decision to read further.

NOTE

Subject lines are like headlines for emails, and can make the difference between an email being deleted instantly and being opened and read. As with a headline, which should be carefully crafted like the headline of a newspaper, use the subject line to make it clear what the email is about. For example, if there is a promotion in the email, consider putting it in the subject line as well.

Save 35% and live a brighter life - today only



Lumosity <newsletter@email.lumosity.com>
to me ▾

Figure 4. A direct, enticing email subject line.

Titles, headlines and subject lines need to be both persuasive and enticing. Consider what need your copy is meeting for your readers, and express that first.

Search adverts

Search adverts have very limited space and time to get a message across, as well as plenty of competition for a reader's attention. These four lines of copy need to work hard to ensure a top return on investment.

Search adverts typically follow the same basic structure and have strict character limits for each line:

Heading	(max. 25 characters)
Two lines of advert copy,	(max. 35 characters)
Which can be displayed on one line.	(max. 35 characters)
www.DisplayURL.com	(max. 35 characters)

With a limited character count, it can seem daunting to communicate information that entices the right people to click through, and differentiates you from your competition. Testing variations of copy is the best way to determine what works best for your campaign. While copywriters are not generally responsible for writing paid search ads, they are often brand custodians and should review all copy representing a brand.

Social copy

Social media allows brands to have conversations with their customers and fans. This gives consumers a powerful voice and the ability to tell brands what they want.

There are a few considerations to keep in mind when creating content for social media:

- **Research is vital.** Understand what type of content community members want. Meaningful and relevant content is more likely to be shared.
- **Remember that it's a conversation.** Your content must be personable and appealing. Use personality and convey the humanity of your brand in order to generate conversation and encourage comments.
- **Write shareable content.** Offer value and be insightful. Ultimately you should aim to create an overall perception that your brand is the thought leader in its industry. Shareable content is credible content.
- **Avoid overly promotional content.** Community members are likely to see right through a sales pitch.
- **Have a solid communication protocol.** These can be internal guidelines for organisations to follow on how they use and communicate on social media platforms.

NOTE

Read more about this in the *Search Advertising* chapter.



Figure 5. Relevant and on-brand social media copy.

NOTE

Read more about this in the *Social Media Channels and Social Media Strategy* chapters.

All of these points are covered in more detail in the chapters on social media.

7.4.2 Long copy

Online copywriting is not just about short, sharp Calls to Action and attention-grabbing headlines and adverts – it also covers longer pieces of content.

Longer copy has advantages. Primarily, it allows you to provide more information and encourage the reader to convert. You can foster a relationship with a reader, whether it is on a blog, through email communications, or through articles and news releases. With more words and space available, you are able to build a voice and a personality into your writing.

The expression 'long copy' is somewhat misleading. As online readers behave slightly differently from offline readers, it is unlikely that a skilled copywriter will be called on to create copy for the web that is longer than 800 or 1 000 words per page (although, of course, there are exceptions to this).

Long copy needs to be structured and formatted so that it's easy for attention-starved web readers to digest. Web users tend to scan pages quickly to determine whether or not they will read further. Specifically in longer copy, you need to take this into consideration.

There are many types of long online copy. Here, we will focus on a few that are useful for marketing:

- News releases
- Articles for online syndication
- Emails
- Blog posts
- Advertorials
- Website

Bear in mind that this is by no means an exhaustive list.

News releases

The news release is a staple of public relations. As the Internet grows, so does the overlap between PR and marketing. As a result, many copywriters are called upon to write news releases for online distribution as this is a standardised format for releasing information. Originally intended to provide information for journalists, news releases are increasingly being read without going through the journalists first. This means that they should be written in the brand tone, be accessible to the general public, and be optimised and formatted according to the principles of good web writing (more on those later). Also remember to focus on a compelling headline to win over your reader.



Figure 6. An online press release from Apple.

Articles for online syndication

Online article syndication involves writing articles that are in no way a direct promotion of your brand. In other words, they are not press releases. These articles are written to provide information and valuable content to readers about something which is indirectly related to your product or service.

NOTE

A compelling headline makes all the difference. For your reader to engage with an article they must believe that reading further is worth it, and your headline needs to do the convincing. Pay as much attention to your headline as you do to the rest of your article.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

For example, a hotel management company could write articles about travel tips and advice, while a pet food seller could create content around ways to keep pets healthy and happy.

Articles are submitted to online article directories, from where they are picked up and republished on other sites.

As the articles contain links and key phrases relevant to your site, the benefits for SEO can be excellent. But the strategy won't work unless people want to read your articles – so they need to be interesting, informative, and not just thinly disguised adverts. You are aiming to inform your audience, position your brand as an expert in your field and demonstrate authority and thought leadership. While this practice is not as widely used as it once was, a well-executed online article syndication strategy can still yield results.

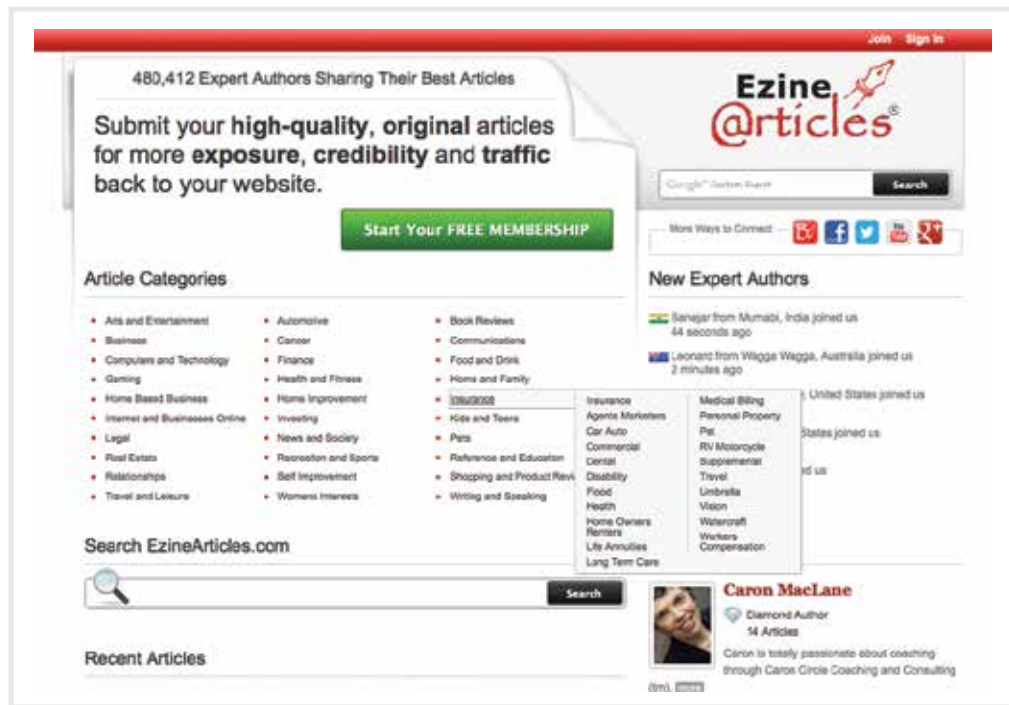


Figure 7. Ezine Articles is an article syndication website.

Emails

NOTE

Read more about this in the *Email Marketing* chapter.

Email as a channel is an integral part of many online marketing strategies. Of course, content is a huge part of this; it comprises the words in an email with which a user engages.

By virtue of their nature, emails are the ideal medium for communicating and building relationships with your consumers. Successful email campaigns provide value to their readers. This value can vary from campaign to campaign. Newsletters can offer:

- Humour and entertainment
- Research and insight
- Information and advice
- Promotions and special offers



Figure 8. Quirk's fortnightly digital marketing newsletter.

Blogging

Blogs can be very successful marketing tools. They're an excellent way to communicate with staff, investors, industry members, journalists and prospective customers. Blogging also helps to foster a community around a brand, and provides an opportunity to garner immediate feedback. This is an audience made up of players vital to the success of a company – which is why it is important to get blogging right. A key consideration is the quality of your headlines – you have to convince your reader to grant you attention..

Figure 9. A blog post on the Fast Company blog.

There is plenty to be gained from the process of blogging and obviously, the value, as with email marketing, lies in the content. This communication channel provides an opportunity for you to foster an online identity for your brand as well as giving your company a voice and a personality. This happens through the content you distribute as well as the tone you use to converse with your readers. There is more information on blogging in the chapter on *Social Media Channels*.

NOTE

Read more about this in the *Social Media Channels* chapter.

Website copy

Digital copywriters need to structure content effectively so that users want to engage on the site and read on. Some ways to create digital copy that is usable and appropriate for an online audience include:

- Writing text that can be easily scanned.
- Using meaningful headings and sub-headings.
- Highlighting or bolding key phrases and words.
- Using bulleted lists.
- Having a well-organised site.
- Limiting each paragraph to one main idea or topic. The leading sentence should give a clear indication of what the paragraph is about. Readers can scan each paragraph without missing any essential information.
- Cutting the fluff. Get rid of meaningless turns of phrase and words that bulk up copy unnecessarily.
- Removing redundancies. These often creep into writing by accident, but you should work to eliminate them in order to get to the point.
- Including multimedia wherever relevant. See <http://www.nytimes.com/projects/2012/snow-fall/#/?part=tunnel-creek> as a good example.

Writing for mobile

Mobile websites differ from traditional websites for various reasons – these are explored in the chapter on *Mobile Marketing*. Here are some points on creating digital copy for mobile websites that encourages interaction and achieves marketing and business goals:

- Get to the point. With limited screen space, there really is no room for wordy text. You need to determine exactly what your message is and get to the point quickly!
- Put the important bits up front. This includes contact information and navigation links. Word these clearly so that people can take the right action.
- Condense information to its simplest form. But ensure that it still makes sense and is grammatically sound.

NOTE

Read more about this in the *Mobile Marketing* chapter.

NOTE

Once users have decided to navigate further into your mobile website, you can increase the amount of copy on the pages.

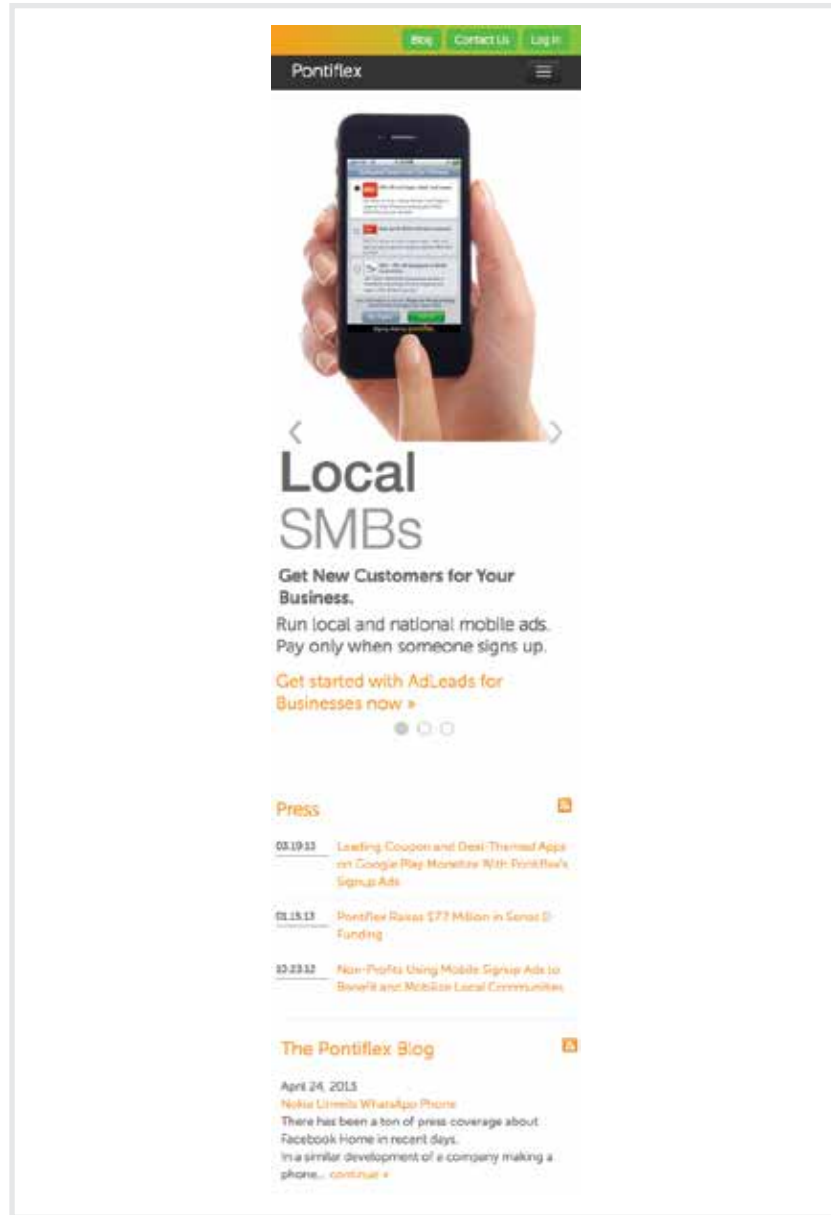


Figure 10. Mobile-optimised copy.

- Use a Call to Action upfront. Mobile web users are goal-orientated, so provide them with the next step early on.
- Use headings and subheadings for scanning.

7.5 HTML for formatting

HTML stands for HyperText Markup Language, and it's the foundation of documents on the web. HTML tags tell browsers how to present content. HTML tags are written in brackets that look like arrows: < >.

A good digital copywriter will also be able to use basic HTML to lay out copy, knowing that the appearance of the page will get his or her words read. It should be easy for users to skip and skim the copy, and it should be easy for them to find the parts that are most relevant to them.

When writing online copy, you can use an HTML editor, where you insert the tags yourself, or a 'What You See Is What You Get' (WYSIWYG) editor, which works in a similar way to a word processor.

Basic HTML is not hard to use, and will help you format your content. Here are some basic HTML tags:

- **To bold:** phrase you want to bold
- **To italicise:** <i>phrase you want to italicise</i>
- **To underline:** <u>phrase you want to underline</u>
- **To list:** lines you want to list
- **To create a paragraph:** <p>paragraph text</p>
- **To insert a line break:**

- **To insert a link:** phrase you want to link
- **To insert a heading:** <h1>Level one heading</h1>
- **To insert a sub-heading:** <h2>Level two heading</h2>

The tags also help search engines to identify how the content has been laid out on the page.

The best way to get to grips with HTML is to start using it online, where you can see how the tags work.

NOTE

Right click on any web page and click 'view source'. Can you find the paragraph tag <p>?

7.6 SEO copywriting

A good online copywriter will have a thorough understanding of SEO and how this can be integrated into his or her writing. Key phrases are used in long and short copy alike, to great effect.

7.6.1 Optimising for human and machine users

One of the most notable differences between writing for print and writing for digital is that when it comes to the latter, you are writing not only for an audience, but also for the search engines. While your human audience should always be your first priority, your copy also needs to speak to the search engines in a language they can understand. This digital tactic will be covered in greater depth in the chapter on *Search Engine Optimisation*.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

Optimising your copy for search engines is important because your target audience is likely to be using a search engine to find the products or services you are offering. If the search engine is not aware that your content can give users the answers they are looking for on a particular subject, it won't send traffic to your website. Optimising your content for search is the process of telling search engines what content you are publishing. Keywords and key phrases are an integral part of this.

SEO copywriters need to know how to blend keywords into their content and how to use them in conjunction with text formatting and meta data. In addition to assisting you with structuring your content, these tags indicate relevance and context to search engines. Some of the tags are used by screen readers, and so they assist visitors with technical limitations to access your content. The meta description can also be used by search engines on the search engine results pages (SERPs).

7.6.2 Key phrases

A keyword refers to a single word used in a search query, while a key phrase refers to more than one word used in the search query.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

Key phrase research is an important element of digital copywriting, and is covered in detail in the chapter on SEO. Having identified the themes of your web pages, keyword research should be used to identify what phrases your target audience use when searching for you. It is important to know what people are searching for, so that you can give them what they need.

Once you have a good idea of the words people are using to find information online, you can use these phrases in your copy as a signal to search engines that your content is relevant to these users.

A good copywriter is able to weave a predetermined set of key phrases into a piece of copy seamlessly, so that the reader cannot detect that they have been included.

Each page should be optimised for a primary key phrase, and can be optimised for a secondary and tertiary key phrase as well. Usually a web page is optimised for three key phrases, but can be optimised for up to five (although only if the page is very long). Any more than that and you are better off creating new, niche web pages.

Key phrases can be integrated into nearly every type of content that you write for the web. Below are a few places where we tend to include key phrases on our website.

Page title

The page title appears at the top of a user's browser and should be able to tell the user (and the search engine spiders, of course) what the main theme of the page is. The page title is usually limited to 71 characters (including spaces). The key phrase should be used as close to the beginning of the title as possible, followed by the name of the company or website.

Page URL

The main key phrase for the page should be used whenever possible in the URL for the page. If you are using a blogging tool or content management system (CMS), the URL is generated from the page title, so using the key phrase in the page title should ensure that it is in the URL as well.

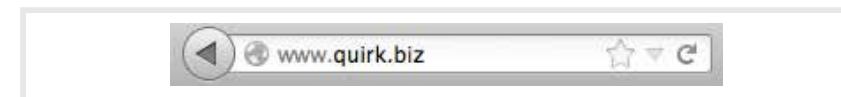


Figure 11. The Quirk home page URL.

Meta description

The meta description is a short paragraph describing the page content. This summary is usually shown on the SERPs if it contains the search term, which means that it needs to entice users to click through with a strong CTA. The spiders use the meta description to deduce the topic of the page, so using targeted key phrases is important here. Copy is limited to 156 characters (including spaces).

NOTE

Every page on a website must have a unique URL, page title and meta description.

Meta keywords

Meta keywords are the list of the words and phrases that are important on a web page. Using targeted key phrases is important, but remember – no keyword stuffing. The meta keywords are limited to 200 characters (including spaces). This is, however, no longer a major source of information used by search engines (though it certainly doesn't hurt to include these).

Headings and sub-headings

Spiders assign more relevance to the text used in headings, so it is important to use your key phrases in the headings on your page. It also helps to structure your content. Headings are created with HTML tags.

Heading structures:

- **<h1> Main page headings**
- **<h2> Sub-headings**
- **<h3> Information under the sub-headings**

Having a good heading hierarchy is important as spiders use it to move through your page and understand its relevance to the search query; it also helps human readers to scan your page.

On-page copy

The number of times you use the key phrases is entirely dependent on how long the page of copy is. You want to optimise the page for the key phrases without their use being overt.

For SEO effectiveness, a page of web copy should be at least 250 words long. On a 250-word page, you could use the primary and secondary key phrases several times (this includes use in meta data, headings, title and body copy). Make sure that these integrate seamlessly into the text and that it sounds as natural as possible.

The page should not be so long that the user needs to scroll continuously to get to the end of it. If you find the page is getting exceptionally long, consider breaking it into different web pages for different sections. In this way, you could add several pages of optimised copy focused on one theme, instead of one very long page.

Links to your optimised page

The text used to link from one page to another is considered important by search engine spiders, so try to ensure that your key phrase is used when linking to the optimised page. The anchor text of links should include the key phrase of the page being linked to, and not the page being linked from.

To review the basics of Quality Score, please see our help center article on how to check and understand Quality Score. We also recommend reviewing 10 things you should know about Ads Quality, which addresses frequent questions and common misconceptions on Quality Score and other external factors that influence the performance of your ads.

Figure 12. Links on a web page dealing with Google Analytics

Images: Alt text and title tags

Alt text refers to the 'alt' attribute for the HTML tag; this is the text that appears in the caption. It is used in HTML to attribute text to an image on a web page, normally to describe what an image is about and display text in instances where the image is unable to load. While this is handy for humans and aids accessibility, it is also used for another reason: search engine spiders can't read images, but they can read the alt text. The image title tag shows when you hover with your mouse over an image (depending on your browser) and can also be read by the search engine spider.

7.7 Best practices for online copywriting

Now that we have covered the basic theoretical principles of writing for digital, we need to look at the best practices to apply whenever you are writing copy for publication on the web. There are several things that you need to consider:

1. Does your copy convey a creative idea?
2. Does the layout of your copy make it easier to read?
3. Is your meaning clear and direct?
4. Does the copy convey the features and benefits necessary to make your point (if applicable)?
5. Will your readers clearly understand the content of your writing?
6. Is the content of your message structured in a logical manner?

The rest of this chapter will be dedicated to ensuring that you have the knowledge and tools to answer these questions.

NOTE

When submitting promotional copy to other sites that includes links back to your own website, which phrases would be most important to include in this link text?

7.7.1 Conceptual copywriting

Most of the points in this chapter have focused on the practicalities of writing online copy, such as getting information across and encouraging user actions and engagement.

But copy should also be creative, beautiful and thought provoking.

Your copy should also express an idea that grips readers. Conceptual copywriting is about making an idea memorable merely by using words to express it – the idea is central, and the words are the vehicles that convey it. Clever wording, smart ideas and thoughtful copy should make the reader pause, think, and want to engage more deeply with your idea.

While images are often used to express powerful ideas, words can be just as effective. Consider this famous example, which demonstrates how a small change in the copy can radically affect one's perception of an idea:

- A woman without her man is nothing.
- A woman: without her, man is nothing.

Writing conceptually means understanding who your audience is, knowing what meaning you want to convey, and then expressing this cleverly through words. The idea is to write so engagingly that people just can't stop reading!

7.7.2 Layout and legibility

As we have mentioned already, readers process content differently online from the way that they read offline. On the web, readers tend to scan text rather than read every word.

As a result, online copy is judged at a glance, not just on content, but first and foremost on its layout. It needs to look as if it's easy to read before a user will choose to read it.

Digital copy should be easy to scan. This means using:

- Clear and concise headings
- Bulleted and numbered lists
- Short paragraphs
- Bold and italics
- Descriptive links

It's easy to see this in practice.

Before	After
<p>Tea has been drunk for thousands of years, and as people are growing more health conscious, tea sales are increasing. Personal preference plays an important role in making the perfect cup of tea. However, using fresh water ensures maximum oxygen in the tea, and warming the teapot first is standard practice. Tradition dictates one teabag per person, and one for the pot. Tea is served with milk, lemon, honey or sugar, according to taste.</p>	<p>Worldwide, tea sales are increasing as people are becoming more health conscious. Here are some tips on making the perfect cup of tea:</p> <ul style="list-style-type: none"> • Use fresh water (for maximum oxygen) • Warm the teapot first • Use one teabag per person, and one for the pot <p>The perfect cup of tea is based on personal preference and taste. Tea can be served with:</p> <ul style="list-style-type: none"> • Milk or lemon • Honey or sugar

7.7.3 Language

The basic principles of good writing apply online, but because your audience's attention is limited (and often divided), it is best to keep it simple and tailor your language to your audience.

Tone

The tone of your content should be consistent with the brand you are writing for. Brands will often have full tone-of-voice documentation – if they don't, read some of the brand material to get a feel for the company's style of communication. Compare the difference in tone in the examples below.

Example of Tone A: Investec

Since Investec was founded in South Africa in 1974, it has expanded through a combination of substantial organic growth and a series of strategic acquisitions in South Africa, the United Kingdom and other geographies.

Investec's strategic goals are motivated by the desire to develop an efficient and integrated business on an international scale through the active pursuit of clearly established core competencies in the group's principal business areas (Investec, 2013).

Example of Tone B: Nando's

500 000 years ago Civilisation as we know it was born. People have started to cook with fire and the idea that food is more than just nourishment. A community spirit is emerging as people gather together around a flame, talking, sharing and laughing, in wait for their meal.

The Mozambique community is flourishing. Life here revolves around early evening feasts about the fire. Everyone joins together to share good food and their heroic stories of the day! This is where the famous story of the discovery of Peri-Peri began. It is said that a young spirited boy went exploring one day and returned late that night with the African Bird's Eye Chilli. It had been shown to him by the African people who named it Pili-Pili (Nandos, 2010).

Active voice

Grammatically speaking, people expect characters to execute actions that have an impact on objects or other characters.

For example: The girl ate a chocolate.

- The girl is the subject.
- Eating is the action
- The chocolate is the object that is affected by the action

This is known as the active voice. Unfortunately, writers often use the passive voice. This turns the object into the subject. For example: The chocolate was eaten by the girl. The human brain automatically translates this into the format that it expects. According to Price and Price, this adds 25% to the time required to understand a sentence (Price & Price, 2002).

When writing for the Web, it is better to use the active voice.

Neologisms and buzzwords

Sometimes the World Wide Web is referred to as the Wild Wild Web as it is an environment where anything goes. The ever-growing numbers of social media participants, for example, habitually play fast and loose with grammar.

With new services and products being developed daily, it can feel as if the list of new words (and their uses) is growing faster than you can keep up with. Dictionaries and reference guides celebrate this regularly with a 'word of the year', usually one

that has been in heavy use on the Internet for the three years preceding its entry into a dictionary.

For example, in 2005, 'podcast' was voted word of the year by the editors of the New Oxford American dictionary (Oxford University Press, n.d.), while 'blog' had its day in 2004 when it was declared word of the year by Merriam-Webster's Dictionary (Merriam-Webster, Inc., n.d.). The word 'blog' was coined in 1999 (Wikipedia, 2012).

Online services can quickly become verbs in everyday language, so we talk of 'Googling something' instead of 'searching on Google', and of 'Facebooking someone'.

Always remember you are writing for your users – and talk in the same way as they talk. If your content is aimed at cutting-edge early adopters, then pepper it with the latest buzzwords. If your audience does not know the difference between Mozilla Firefox and Internet Explorer, then be cautious when using a word that did not exist the day before.

Features and benefits

Writing compelling copy means conveying to readers why they should perform an action. While features may seem all-important, you need to communicate the benefits of the features to the user.

- **Feature:** a prominent aspect of a product or service that can provide benefit to users. It describes what the product does.
- **Benefit:** the positive outcome for a user that a feature provides. It can be the emotional component of what the user gets out of the product.

For example, consider a home entertainment system. Features could include surround sound and a large flat-screen television. The benefit is a cinema-quality experience in your own home.

Features and benefits are very different. Features are important to the company that provides the product or service. Benefits are important to those who decide to use the product or service.

Persuasive writing makes use of features, benefits and active verbs to create appealing messages for your personas:

Enjoy cinema-quality movie nights in your own home with a surround-sound home entertainment system.

NOTE

Why would your audience want to buy your product or service? Put aside the features for a moment; what will compel your audience to buy on an emotional level? How does it address their wants and needs?

7.7.4 Logic

The structure of online copy can be compared closely to the structure of a newspaper article. The headline, usually containing the most important bit of information in a story, comes first. Online, visitors need to decide quickly whether or not to read a page. As a result of this, the most important information needs to be at the top.

Start with the summary or conclusion – the main idea of the article.

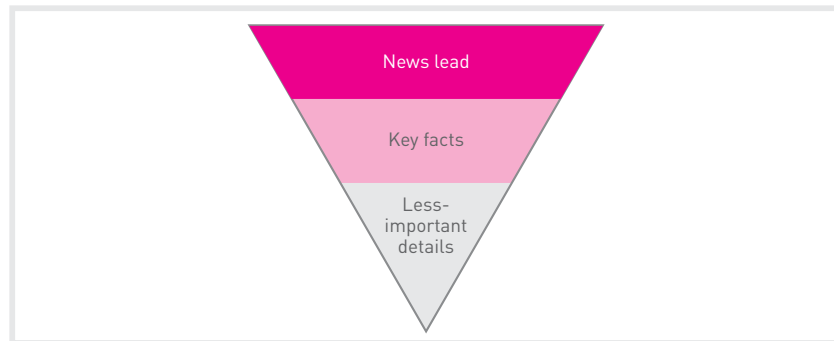


Figure 13. Information hierarchy.

While clever word play in headings can attract some attention, these need to be written in line with the objective you want to achieve. The copy is multitasking: not only is it informing visitors of what to expect; it is also telling search engine spiders what the page is about.

7.8 Tools of the trade

The **Simple Measure of Gobbledygook** (SMOG) formula from Harry McLaughlin can be used to calculate the reading level of copy that you have written. A SMOG calculator, and instructions for use, can be found on his website: www.harrymclaughlin.com/SMOG.htm

Alternatively, www.flesh.sourceforge.net offers a Java application that produces the Flesch-Kincaid Grade Level and the Flesch Reading Ease Score of a document.

For an **online dictionary** and an **online thesaurus**, you can visit www.dictionary.reference.com and www.thesaurus.com. Thinkmap's **Visual Thesaurus** at www.visualthesaurus.com is a thesaurus, but also has an interactive map that lets you explore words. It's easy to spend a lot more time on this website than you originally planned!

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

When it comes to **keyword research**, there are a host of tools available. Have a look at the tools suggested in the chapter on SEO.

7.9 Case study: Encyclopaedia Britannica Online

7.9.1 One-line summary

Encyclopaedia Britannica increased sign-ups by 103% by applying web copy best practices.

7.9.2 The problem

Encyclopaedia Britannica is a household name, renowned for producing accurate and up-to-date content. Encyclopaedia Britannica Online is a subscription-based digital service that offers a range of informational tools and articles. The site also offers a free trial subscription that lets interested people try out the service before committing to a purchase.

The web page on which users could sign up for the free trial was performing adequately, but it was bogged down by structural and copy mistakes. The brand was not sharing a value proposition or driving users to complete the desired on-page action – signing up for the trial version.

7.9.3 The solution

In order to increase sign-ups, Encyclopedia Britannica completely transformed the copy on the 'free trial' page of the website. Some of the changes made included the following:

- **Heading:** The heading and subheading were rewritten to grab the reader and express the value and content of the offer. The heading changed from the rather generic "Why try Encyclopedia Britannica?" to a clear, specific offer: "Get unlimited access to all 32 volumes of Encyclopedia Britannica during your FREE TRIAL..."
- **Copy:** the amount and type of copy on the page was drastically reduced. Rather than paragraphs of persuasive 'power' copy, the new version launched directly into the content of the offer, making clarity the guiding principle.
- **Benefits:** Member benefits were moved from an out-of-the-way column on the left to the centre of the page, and were reformatted into bullet points with bolding for emphasis.
- **Images:** The old page included lots of images but none of them were specifically relevant to the product or offer. This was changed to a single large image displaying the encyclopedias and a computer screen. The image was also given a caption that reinforced the value offering.
- **Call to Action:** Several aspects of the CTA were changed to make the offer more appealing. The main button was rewritten from 'Take a free trial' to 'Get instant access now' (emphasising that the user would receive something rather than having to take it). The saving was also included and highlighted in yellow to draw the reader's eye.

- Form:** Rather than having the user click away to another page, the reworked version included a form with the catchy title 'Activate your free trial', making it clear that the user would get the benefit by providing their information. This allowed the user's through process to flow directly from understanding the benefits to signing up directly.

To make sure that the experiment was working, the new page was tested alongside the original in an A/B split test ([more on this in the Conversion Optimisation chapter](#)).

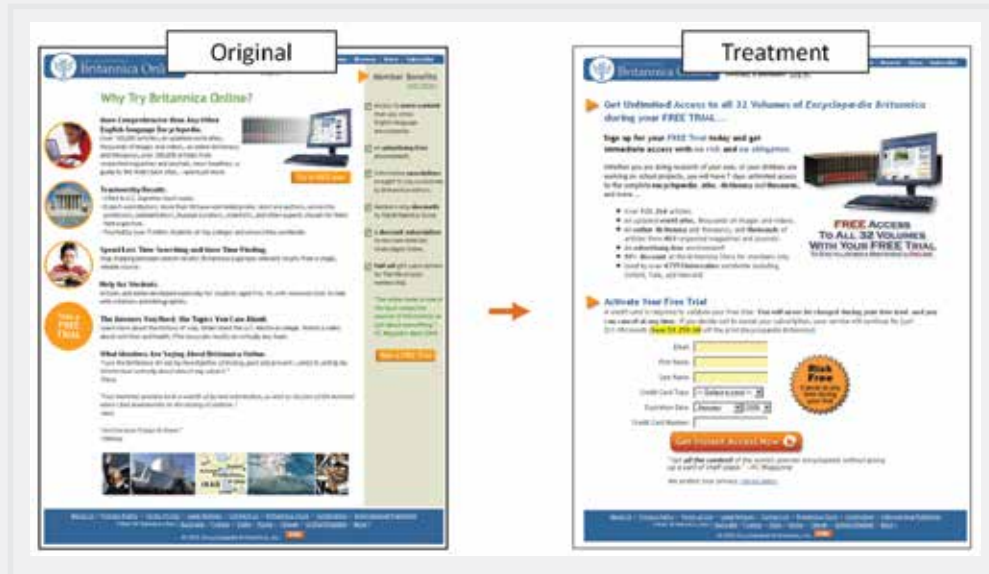


Figure 14. Before and after versions of the Encyclopaedia Britannica sign-up page. (Source: Marketing Experiments)

7.9.4 The results

The new version of the page, filled with effective and targeted copy, had a clickthrough rate of 2.03%, compared to just 1% previously. This garnered a 103% increase in conversions – in other words, more than doubling the number of people who signed up for the trial version. Aside from this, the brand was able to communicate their offer and express their value proposition upfront, leading to greater clarity.

7.10 The bigger picture

It should be pretty clear by now that online copy touches every other digital marketing tactic. After all, they all need to communicate messages in text format – whether that's a CTA button on a website, a video description, or a long-form press release written for digital PR purposes.

While content marketing strategy may tell you *what* content to create, knowing *how* to create it comes down to great web writing skills.

Writing for digital also overlaps strongly with SEO, since copy is the basis of all web optimisation (search engines can't read images, videos or other rich media content).

7.11 Chapter summary

Online copy is the foundation of a website. It is constantly in view – and usually the focal point of a page. Good online copy can also make the difference between a site attracting regular traffic and becoming stagnant.

Your writing needs to have the reader in mind first and foremost. The copy should be strong, clear and easily readable, while still making maximum use of key phrases.

7.12 Case study questions

- How could bad copy prevent someone from signing up to a valuable, free service like the trial offered by Encyclopaedia Britannica?
- Why do you think the more specific headings performed better than a vaguer, more intriguing heading?
- Identify the web writing best practices that were included in the new version of the Encyclopaedia Britannica website.

7.13 Chapter questions

- When writing for digital, why are descriptive titles better than titles which play on words?
- Why should users dictate your content? List some ways that users' needs determine content.
- Why does web copy need to be easy to read?
- For some real online copywriting practice, choose an article in a magazine or newspaper, and rewrite it for an Internet audience.

7.14 Further reading

To get started on writing for digital, *Hot Text – Web Writing That Works* is an easy-to-read and thorough resource. The website for the book is www.webwritingthatworks.com.

Another excellent resource is *The Idea Writers: Copywriting in a New Media and Marketing Era* (us.macmillan.com/theideawriters/Teressalezzi)

www.copyblogger.com has regular articles and case studies on writing online copy that converts.

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Part 3

Engage

Introduction to Engage

The next few chapters deal with driving traffic to your online assets – and engaging this stream of potential and existing customers by building relationships with them. The beauty of the Internet is that you can track your traffic-driving campaigns and then use that information to measure your results, report on campaigns, and target your marketing more effectively.

It's useful to consider all of these tactics in terms of their influence on the sales cycle. The sales cycle is the typical sequence of phases through which a customer moves. It's often represented as a funnel, indicating that there are fewer consumers further along in the sales cycle – you learnt about this model in the Think section.

NOTE

Google has some intriguing insights about the role each channel plays, depending on the industry you work in. Have a look here: <http://www.google.com/think/tools/customer-journey-to-online-purchase.html>.

While one could argue that all channels are important at every phase of the purchase cycle, some are clearly more influential at specific times than others.

Online Advertising is the crucial first step – this is a tactic that builds awareness about and interest in your brand. Sometimes, performance marketing or **Affiliate Marketing** is used to drive traffic and awareness.

Once a potential customer knows about you, they can search for you. Search marketing, which comprises **Search Engine Optimisation** and **Search Advertising**, is powerful because it is closely aligned with a customer's stated intent (in the form of a search query).

Choosing you as their preferred option often hinges on how favourably you are seen by others in the market. Being well represented on **Social Media** is important for brands marketing online, and online monitoring tools help you to understand how digital communities perceive brands.

Video Marketing is another excellent tool for engaging and capturing your audience's attention.

Digital then takes it further into the realm of building relationships with customers, using digital channels to interact and engage with them. Again, social media plays a big role here, as do traditional **Customer Relationship Management (CRM)** tactics such as **Email Marketing**.

With the explosion in web access via mobile devices, it's important to understand these various channels from a mobile perspective. **Mobile Marketing** is used to create awareness, drive direct action and build relationships.

While measurement and tracking will be discussed in each chapter, it's worth going into the Engage chapters with an understanding of how we track, report on and pay for various online campaigns.

There are several terms you will see used throughout these chapters:

- **Impression:** when an advert or a piece of online content is served (and hopefully seen by a web user).
- **Interaction:** when a user interacts with an advert or content, such as watching a video, playing a game, or leaving a comment.
- **Click:** exactly what it sounds like – when a user clicks on a link or advert. This is different from an interaction, because when a user clicks, they go to a different page on the web.
- **Action:** when a user completes a predetermined action, such as making a purchase, signing up to a newsletter, or downloading some content.

These terms are reflected in the different ways of paying for and measuring online campaigns. Sometimes we talk about campaigns in terms of cost per thousand impressions (CPM). This is when campaigns are paid for based on the number of times content has been served. It's a technique used frequently in online advertising, but is also a way of measuring social content.

One can also look at the cost of a user interacting with a piece of content. Some of the most successful online campaigns are run on a cost-per-click (CPC) basis, where you don't pay for content to be served, but rather for each click on that content. Lastly, payment or measurement can be regarded in terms of the cost per action (CPA): the cost of a user taking a specific action (excellent for the advertiser but risky for the publisher).

As you work through the following chapters, the above will become clearer to you.

Remember, the chapters that follow are important arrows in your digital marketing quiver. However, a strategic approach is required in order for you to determine the best solutions to meeting your online goals. You don't need to tackle everything at once: focus on the foundations first, and then track and measure in order to determine which channels are working best, optimising as you go. And always put your audience's needs and wants first.

08

Customer Relationship Management (CRM)

What's inside: An introduction to customer relationship management (CRM), and why CRM **plays a massive role in marketing**. We look at **different forms of customer relationship management** and how these can positively benefit your business. We discuss the importance of data, provide a **step-by-step guide to implementing CRM**, together with some **tools of the trade** and a case study **showcasing a CRM strategy**.

8.1 Introduction

CRM – customer relationship management – has existed since people first started selling things. The first shopkeeper who stopped to chat with his customers, who remembered their names, and perhaps gave them a small ‘freebie’ for continually using his services, was practicing a form of customer relationship marketing by making customers feel special. He was also probably seeing the favourable impact on his bottom line.

Today, with businesses becoming more digitally remote, and person-to-person contact becoming more scarce, CRM is more important than ever. We need to build and maintain relationships with our customers. A faceless company is not personable or engaging – it has to work harder to fill the gap between attracting and retaining customers (and their good will). The relationship a customer builds with a company is often the reason they return – but building it today is more difficult than ever, in a society where data is protected, customers are smart and exercise their right to choose, and a competitor can be just a click away.

NOTE

Since ROI can be hard to establish, how could you go about convincing business decision makers that it's important to implement a CRM system?

CRM is a customer-focused approach to business based on fostering long-term, meaningful relationships. CRM is not about immediate profit. It's about the lifetime value of a customer – the purchases they will make in future, the positive word of mouth they will generate on your behalf and the loyalty they will show your brand. Effective CRM enables businesses to collaborate with customers to inform overall business strategies, drive business processes, support brand development and maximise ROI.

There is a truism that a happy customer tells one person, but an unhappy customer tells ten. With your customers' voices being heard on blogs, forums, review sites and social media, they can talk really loudly and impact your business much more easily.

In this chapter, you will learn:

- Why CRM is essential for any business
- The role that customers play in shaping and steering your business
- The various approaches and mindsets that are applied in CRM
- How to collect, store, analyse and update your essential CRM data
- The step-by-step process of putting together your CRM strategy

8.2 Key terms and concepts

Term	Definition
Customer	A person who buys or uses goods or services, with whom a company should develop a relationship.
Customer-centric	Placing the customer at the centre of an organisation's business planning and execution.
Customer-driven	Allowing and encouraging customers drive the direction of a business.
Customer lifetime value (CLV)	The profitability of a customer over their entire relationship with the business.
Customer relationship management (CRM)	A strategy for managing a company's relationships with clients and potential clients. It often makes use of technology to automate the sales, marketing, customer service and technical processes of an organisation.
Data	Statistics and facts collected for analysis.
Data mining	The process of analysing data to discover unknown patterns or connections.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Metric	A defined unit of measurement.
Model	A strategic visual representation of a process that a company adheres to.
Prospect	A potential customer.
Stakeholder	A person or organisation with an interest in how a resource is managed.

8.3 A CRM model

Many companies that practice CRM rely on a simple model to guide them strategically – in many cases, this sums up exactly what CRM is about. Here is a simple model that demonstrates this:

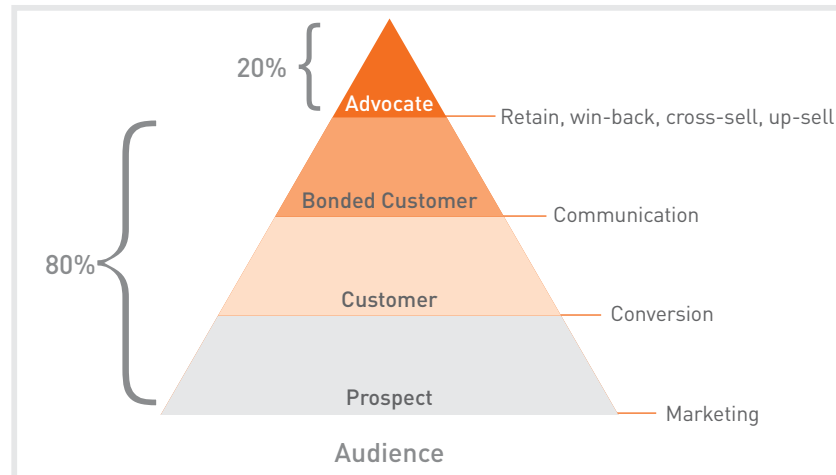


Figure 1. A simple CRM model can provide strategic guidance.

As you can see, a good CRM strategy turns strangers into customers, customers into friends, and friends into advocates for your business.

8.4 Understanding customers

Customers can be seen as the most important stakeholders in a business. Without customers purchasing goods or services, most businesses would not have a revenue stream. But it can be difficult to shift from realising this important fact to implementing it in day-to-day business decisions and strategy.

NOTE

What does great customer service mean for your brand? Each business is different, and customers also have differing expectations and needs.

A successful relationship with a customer is based on meeting or even exceeding their needs. It is in determining what problems the customer has, and in providing solutions, sometimes before the problem occurs. It depends on continually giving the customer a reason to transact with your company above any other.

CRM should not only mean implementing customer-centric processes and consider technology, but **embracing customer-driven processes**. Through innovations in digital technologies, enhanced customer engagement and the introduction of mass personalisation, **the customer can often drive the business**.

8.4.1 Consumer touchpoints

Consumer touchpoints are all the points at which brands touch consumers' lives during their relationship. This is the starting point for all CRM – a brand needs to speak with one voice across all of these touchpoints and **deliver a rewarding**

experience every time it interacts with its customers. Touchpoints can be brand initiated (for example, a brand sending an email newsletter) or customer initiated (for example, the customer making a purchase in a store).

People don't start out as customers; they begin as prospects – people who merely view a business's offering. Once a prospect has expressed interest, CRM can help to convert them into a customer. Some people will always shop on price – they need to be converted to loyal customers. Here brand perception and service are often the differentiators. Consider the prospect who walks into a car dealership and is given outstanding service. In this case, CRM – in the form of an aware and trained sales force – can help turn a prospect into a customer.

A consumer touchpoint can be as simple as a print or banner ad. It can also be as multifaceted as a conversation between a call centre agent and a customer. It can be a timely tweet, or an outbound email giving the customer details about their account. Even statements and bills are touchpoints – and need to be managed carefully to ensure that the brand continues its relationship with the customer successfully.

Customer touchpoints can generally be divided into three spheres or phases.

Pre-purchase or pre-usage covers the various ways brands and prospects interact before the prospect decides to conduct business with a company. The brand's goals here are to:

- Gain customers
- Heighten brand awareness
- Shape brand perceptions – to highlight the benefits it offers over competitors
- Indicate how the brand provides value and fulfils the needs and wants of consumers
- Educate consumers about products and services

Purchase or usage covers the touchpoints at which the customer decides to purchase a product, use a service or convert according to set criteria, and initiates the brand-customer relationship. The key goals are to:

- Instil confidence
- Deliver value
- Reinforce the purchase decision
- Heighten brand perceptions

Post-purchase or usage covers all the post-sale interactions between the brand and customer. Now, the brand wants to:

- Develop a relationship
- Maximise the customer experience
- Deliver on the brand promise
- Increase brand loyalty
- Remain top of mind
- Invite repeat purchases

8.4.2 Customer loyalty

NOTE

The main objective of any CRM strategy should be to gain customer loyalty over the long term. But what is loyalty? This may mean different things for different organisations. Ultimately, it is about **acquiring and retaining customers** who:

- Have a projected lifetime value that makes them a valuable prospect to your business
- Buy a variety of your products or use your services repeatedly during their time as a customer
- Share their positive experiences with others
- Provide honest feedback on these products and services, and their experiences
- Collaborate with you on ways to improve their experiences

8.5 CRM and data

Data is central to the success of CRM initiatives. **Knowing who your customer is and what they want** makes a CRM strategy successful. Data gathering can begin even before your prospect becomes a customer. Matching a prospect's profile to the product or offer is the first step.

But data on its own is meaningless if it is not analysed and acted upon. Through analysis, data can be turned into insights, which can then inform the various CRM processes and, indeed, the business itself.

Data should be used to drive consumer loyalty across all possible touchpoints. Consider the consumer who shops on her store card at a retail outlet. Her transactions are recorded against her card – she is sent offers that detail the latest fashion trends and earns points on her card shopping for these. At some point, her transactional data shows that she has started shopping for baby clothes – she can now be cross-sold products to do with babies, and rewarded with double points when she buys them. Now she is upping her spend in the store, cross-shopping for both herself and her family and being rewarded for this, thus ensuring that the retail outlet is offering her value and retaining her business.

8.5.1 Customer data

A good CRM programme begins with data. Who are my customers and what do they want? Why did they choose me in the first place? How many of them are active, and continue doing business with me? Why do the others stop?

Often, you will need to research this information. If the company has a database, conducting surveys, focus groups or dipstick telephonic research can help you get an idea. Consider that an Audi Q7 driver is vastly different to an Audi A1 driver, for instance. They both pick the brand for the same reasons, but their motivations behind choosing the products vastly differ.

Data can give you these insights. It can enable a company to create real value for the customer and thereby gain true loyalty. There is little point in running a customer insights survey, looking at the results and saying “that’s interesting” without putting into action any changes suggested by the results. It also means customers are less likely to take part in surveys going forward, and quite rightly so – what’s in it for them? Conversely, if you do action changes, customers will feel increased ownership in the brand and its offering.

The actual database in which you choose to gather and collate data is also crucial. Remember that there are many facets to CRM, and the quality and accessibility of the data will have a major impact on how well these processes run.

When looking at data, it is essential to keep in mind the **Pareto principle**. The Pareto principle, or 80/20 rule, holds that in many situations approximately 80% of profits are delivered by 20% of customers. Also keep in mind that 20% of customers are responsible for 80% of problems related to service and supply (Koch, 2008).

This means designing solutions with efforts directed at the 20% of customers who generate the most profits. To do this, you should segment customers effectively.

NOTE

Read more about this in the *Market Research* chapter.

You'll also want to consider the exact data to collect. While this will depend largely on your business objectives, here are some considerations:

- Information should be commercially relevant.
- Capture additional contact details from the customer at every interaction – on purchases, contracts, negotiations, quotes, conversations and so on.
- Capture any information you send out to the customer.
- Consider anything that adds value to the relationship.
- Note any legal implications around capturing data, particularly web-based behavioural data, as the user's privacy must always be taken into account.

8.5.2 Where and how to gather CRM data

CRM data is gathered from a variety of touchpoints. Let's look at some of the possible opportunities for CRM data capture and analysis. Each avenue discussed below collects a range of data from whichever touchpoints the business deems valuable.

Traditional CRM system data

Most traditional CRM systems are used to capture data for sales, support and marketing purposes. On top of simply creating a central repository for data access, these systems and their related databases also offer basic analytics. The actual range of data collected within the traditional CRM system is dictated by the CRM objectives. For instance, data could include:

- Demographic details on potential leads, current leads and contacts, such as age, gender, income, etc.
- Quotes, sales, purchase orders and invoices (transactional data)
- Psychographic data on contacts such as customer values, attitudes, interests, etc.
- Service and support records
- Customer reviews or satisfaction surveys
- Web registration data
- Shipping and fulfilment dates, such as when orders were shipped and delivered

Data mining

Data mining involves analysing data to discover unknown patterns or connections. It is usually conducted on large datasets and looks for patterns that are not obvious. Data is analysed with statistical algorithms that look for correlations. It is used by businesses to better understand customers and their behaviour, and then to use this data to make more informed business decisions. For instance, women might traditionally be shopping for nappies during the week. But on the weekend, men become the primary nappy-shoppers. The things that they choose to purchase on the weekend, such as beer or chips, might dictate different product placement in a store over a weekend.

NOTE

Data mining is typically performed by computers, which can sift through massive amounts of data and find tiny (but significant) patterns that a human researcher may overlook.

Analytics data

Analytics data is generally captured through specialised analytics software packages. These packages can be used to measure most, if not all, digital marketing campaigns. Web analytics should always look at the various campaigns being run. For example, generating high traffic volumes by employing CRM marketing tactics like email marketing can prove to be a pointless and costly exercise if the visitors that you drive to the site are leaving without achieving one (or more) of your website's goals.

NOTE

Read more about this in the *Data Analytics* chapter.

Social media monitoring data

There are many social media metrics that are important to monitor, measure and analyse, and some of these can provide valuable insights for CRM implementation. This can cover everything from quantitative data about number of fans and interactions, to qualitative data about the sentiment towards your brand in the social space.

8.5.3 Collating and organising your data

Typically, you'll find that a business has:

- One or more databases – e.g. email, customer, mobile, or call centre databases.
- A point of sale system where product purchase data is stored.
- Various forms of web data – from display or search networks, keyword research, site analytics, social media or email marketing.
- Social media profiles on sites like Twitter, Facebook or LinkedIn (which can also be considered databases of sorts).

CRM software can be used to automate lead and sales processes, and to collect all of this customer information in a centralised place, allowing a company to get a holistic view of the customer – from this, meaningful data insights can emerge.

NOTE

Have you ever had a frustrating service experience yourself as a customer? How did you feel about the brand afterwards?

Organisations can be large, and a customer often speaks to several members of the organisation, depending on the nature of the communication. It would be extremely frustrating for the customer to have to explain all previous dealings with the organisation each time, and equally frustrating for an organisation not to know who has spoken previously with a customer and what was dealt with. This could be a touchpoint at which a company falls down, and leaves a less than positive impression with the customer.

Fortunately, there are many technological options that help to record all this information in one place. Most of these services can also schedule elements of the sales process, and set reminders where appropriate for follow-up action.

Some notable examples include Salesforce (www.salesforce.com), Genius (www.genius.com) and Highrise (www.highrisehq.com) from 37signals. Bespoke technology tailored to business problems can have remarkable results.

8.5.4 Keeping data fresh

Call it what you will, but “stale”, “outdated” or “unhealthy” data doesn’t benefit anyone. Some generic older data can help you assess trends over time, but identifiable customer data is usually useless if not up to date. People move house, update their contact numbers and email addresses, change jobs. They earn more or less, stop working, start working, have kids, retire. All of these mean that their needs change, and their contactability changes, so maintaining a customer relationship and delivering the things they want becomes impossible.

So, how do you keep your data fresh?

For generic data (like web analytics), you must **continuously monitor trends and note what causes changes over time**. This is also useful for monitoring trends and identifying gaps in data when a business evolves. For instance, if you know that you generally receive increased website and store visits during December, but your sales drop, you know that you need to gather more data around your inventory and in-store environment during that time.

Keeping identifiable data current means you need to facilitate regular dialogue with contacts on your database. Whether it’s through a call centre, an online prompt or a quick question at your in-store point of sale, there needs to be a plan for updating details at regular intervals.

8.5.5 Analysing data for marketing

One of the most powerful features of interactions and transactions over the Internet is that everything is tracked and recorded (see the *Data Analytics* and *Conversion Optimisation* chapters). This provides a wealth of data that can be analysed to make business decisions.

For CRM, this means that the customer acquisition source can be recorded and analysed against sales data. This leads to a very accurate return on investment (ROI) calculation and indicates where CRM and marketing efforts should be focused.

ROI stands for return on investment – and it’s key to understanding whether marketing efforts have been successful. Here’s a simple example: Company A sells accounting software and makes R10 000 on each product it sells. It sends an email to its customer base – people who have bought a previous version of the software and might be interested in upgrading. The campaign has an overall cost of R100 000. Of the 5 000 people who receive the email, 10% decide to buy. That means it cost R200 to acquire each of the 500 customers. The company has made R5 million – an ROI of 50:1.

The key to effective use of technology in CRM is integration. Ensure that all channels can be tracked, and that information is usable to all parties within an organisation. Knowing where your customers come from, but not what they purchase, is pointless: these two metrics need to be compared in order to produce actionable insights.

Analysing CRM data can aid marketing initiatives in a variety of ways:

- **Campaign analysis** – find out which marketing campaigns are leading to the best returns so you can refine them and increase ROI
- **Personalisation** – customise your communications to each customer
- **Event monitoring** – tie offline events, like shows or sales, to your online interactions and sales
- **Predictive modelling** – predict a customer’s future behaviour and meet this need at the right time
- **Improved customer segmentation, including:**
 - Customer lifetime value (CLV) analysis – predicting each customer’s lifetime value and managing each segment appropriately (for example, offering special deals and discounts)

NOTE

Read more about this in the *Optimise* chapters.

NOTE

Mobile marketing can play a key role in offline events – after all, the mobile phone is portable and connected to the internet, meaning that people can engage with a brand directly on location.

- o Advanced customer profiles that identify certain behaviours, such as big spenders or those who look for bargains by attending sales. This information can be used to tailor marketing communications accordingly
- o Customer prioritisation – target small groups of customers with customised products and service offerings that are aligned to meet customer needs, rather than simply generic current offerings. You should craft specialised retention strategies for customers with the highest CLV
- o Identifying brand influencers and advocates. Consider the realm of social media, where influencers are central to the spread of content. Brands are increasingly prioritising relationship building with social media influencers to build brand advocates who will help market the business for them. By identifying which customers are providing the most value and positively influencing others to become customers, you can focus efforts towards them and increase their loyalty, creating true brand advocates

Understanding customer lifetime value

CLV is the profitability of a customer over their entire relationship with the business. Businesses need to look at long-term customer satisfaction and relationship management, rather than short-term campaigns and quick wins – this approach leads to increased value over the entire lifetime of a customer and means that CLV is a metric central to any CRM initiative.

It's important to look at your customer base and segment them according to how often they purchase and how much they spend with your company. Very often, customers who spend more cost more to acquire, but they might also stay with the company for longer. Referrals made by a customer can also be included as part of the revenue generated by the customer.

The key is to understand these costs and then target your CRM strategies appropriately. CLV lets you decide what a particular type of customer is really worth to your business, and then lets you decide how much you are willing to spend to win or retain them.

For example, a potential customer looking to purchase a digital camera is likely to search on Google for cameras. As a company selling digital cameras, your excellent search advert and compelling offer attract the potential customer, who clicks through to your website. Impressed with your product offering, the user purchases a camera from you, and signs up to your email newsletter as part of the payment process.

Analysing the amount spent on your search campaign against the sales attributed to the campaign will give the cost per acquisition of each sale. In this case, this is the cost of acquiring the new customer.

As the user's now signed up to your newsletter, each month you send her compelling information about products she might be interested in. These newsletters could be focused on her obvious interest in photography, and highlight additional products she can use with her new camera. The costs associated with sending these emails are the costs of maintaining the relationship with the customer. When she purchases from you again, these costs can be measured against the repeat sales likely to be made over the course of the customer's lifetime.

Assuming that a customer buys a new camera every three years, moves up from a basic model to a more expensive model, perhaps buys a video recorder at a certain point – all of these allow a company to calculate a lifetime value and ensure that their spending on a particular customer is justified.

CRM loyalty programs

There is a difference between CRM and loyalty programmes – often loyalty programmes actively seek to maintain customers by rewarding them with a hard currency, like points. Loyalty programmes are designed to develop and maintain customer relationships over a sustained period of time by **rewarding them for every interaction** with the brand – for instance, you may earn points on a purchase, for shopping on certain days, completing a survey, or choosing to receive a statement by email.

Consider health insurer Discovery and their Vitality program: it aims to keep customers healthy by rewarding them for health-related behaviours like exercising, having regular check-ups, stopping smoking and buying fresh foods. By doing so, it reduces the burden of ill-health on the medical aid itself.

Not all loyalty programmes are created equal. Many brands have embraced them as a way to improve their sales, and consumers have come to believe that they are simply a way of extorting more money from them.

To create an effective loyalty programme, consider the following:

- **Carefully calculate the earning and redemption rates of points** – a loyalty programme needs to give the appearance of real value, while working within the company's profit projections
- **Loyalty programmes are about engagement** – you need to find a way to partner with the customer

NOTE

The reward you offer must be meaningful, relevant and valuable – in other words, something the customer really wants. They should also be exclusive to members of the loyalty programme, making them feel appreciated.

- **Rewards are key to success** – you need to reward the customer in a way that is real and desirable
- **Customer care is important** – technology allows for effective real-time conversations
- **Data is central to success** – you need to maintain accurate records in one central place
- **Digital allows for innovation** – this can apply to new payment technology, digital communications channels and more
- **Trust is pivotal to success** – customers need to know that their data is being protected and that you will honour your commitments
- **Loyalty programmes are not quick wins** – consider up-front how the programme might come to a close or you risk alienating and disappointing customers and undoing any positive results

8.6 The benefits of CRM

At its core, effective CRM promises the following:

- Increased revenue and profitability
- Improved customer satisfaction and loyalty
- Improved service delivery and operational efficiencies
- Decreased acquisition costs – keeping churn low through CRM offsets the need to spend as much on acquisition of new clients, while retention of existing ones is cheaper for obvious reasons

Maintaining good customer relationships is critical to the success of a business. The cost associated with acquiring a new customer is generally far higher than the cost of maintaining an existing customer relationship. While an investment in a CRM communication programme or platform can be large, these costs are often offset over the increased revenue generated by encouraging repeat business.

8.6.1 Putting a value on CRM

Broadly, CRM can be looked at from:

- **A marketing perspective** – increasing the number of people who know about your service or product

- **A cost perspective** – decreasing the amount you spend on customers; it costs more to attract a new customer than maintain an existing one
- **A sales perspective** – turning the people who know about your service or product into people who have made a purchase
- **A service perspective** – ensuring people who have interacted with you are satisfied and delighted.

Effective CRM can also create a powerful new marketing and referral force for a company: its happy customers. **Delighting customers fosters positive word of mouth.**

The first step to any CRM initiative is to understand the value of a customer relationship to a business.

$$\text{Relationship value} = \text{Revenue generated by customer} - \text{Cost}$$

8.6.2 CRM implementations

CRM should infuse every aspect of a business (in the same way that marketing should be integral to everything you do), but it is useful to look at the different ways CRM is implemented.

Marketing

- Conduct personalised targeting and profiling across a range of marketing channels such as telemarketing, email marketing, social media marketing and campaign management projects.
- Place the right mix of a company's products and services in front of each customer at the right time.
- Understand what customers do and want, matching that knowledge to product and service information and measuring success.

Sales

- Ensure the customer receives the correct product.
- Ensure correct sales-related processes are carried out within the organisation. This could include:
 - Client or campaign management
 - Sales configuration (for configuring products, pricing, etc.)

NOTE

CRM systems let you be consistent in handling customer queries - an essential aspect of trustworthiness and good service.

- o Call management
- o Contact management
- o Ad management
- o Sales force automation (including territory)
- o Account and lead management systems
- Enable all parties in the transaction to interact with one another.
- Include systems that put sales reps directly in touch with customers at the point of sale.

Service and service fulfilment

- Improve the service you give to current customers through:
 - o Email response management
 - o Social media support systems
 - o Telephony capabilities such as automatic call distribution
 - o Computer-telephony integration
 - o Queue/workflow management
 - o Interactive voice response and predictive dialling
- Include the development of problem resolution systems, workflow automation and field service dispatch systems.

Services invoked by the customer

- Create and manage systems or capabilities that can be directly invoked by the customer:
 - o Web self-service
 - o Search
 - o Instant messaging
 - o Email queries
 - o Voice over IP (VoIP)
 - o Browser and application sharing
 - o Conferencing
 - o "Call me" capabilities
 - o Social media support
 - o Online forums

NOTE

Providing a self-service support system can cut down on service costs and empowers customers to find their own solutions.

8.7 Social CRM

Widespread social media usage means that CRM has to be conducted in this forum in order to deliver an all-round experience for the customer. Not only should social media be integrated into any existing CRM strategy and looked at from a touchpoint and channel perspective, but social media can also be used to drive CRM.

CRM should embrace the social customer – effectively summed up by social CRM expert Paul Greenberg as follows:

"Social customers are not the customers of yore. They trust their peers, are connected via the web and mobile devices to those peers as much of a day as they would like. They expect information to be available to them on demand ... They require transparency and authenticity from their peers and the companies they choose to deal with" (Greenberg, 2010).

Social media platforms allow customers to easily share their brand experience (good or bad) with their online social connections, who in turn can share this experience on. This means a potential word-of-mouth audience of millions could witness a single user's brand experience and weigh in on the situation. Social customers place a great deal of value on the opinions of their peers, and are more likely to look favourably on a brand, product or service if a peer has recommended or praised it. In fact, the 2012 Edelman Trust Barometer, an annual trust and credibility survey, saw trust in social media increase by 75%, noting that respondents are placing more and more importance on information gathered from this space (Edelman, 2012).

Brands have realised that they need to leverage this in their CRM strategies and now understand that communication is not one way (from brand to consumer), or even two way (between consumer and brand) but **multi-directional** (brand to consumer, consumer to brand, consumer to consumer).

The convergence of social media with CRM has been termed social CRM or CRM 2.0, and has developed into a field on its own.

8.7.1 Social CRM and support

Social customers are increasingly turning to social media channels for support. With the immediate accessibility offered through mobile devices, they see this as a convenient channel to communicate with brands. This means that brands need to respond quickly and transparently to consumers' questions, gripes and even compliments. A support query going unanswered on Twitter, for instance, is likely to cause frustration for the consumer, and prompt them to take a situation that is already visible to other consumers even further, potentially causing a brand crisis.

NOTE

Zappos, an online retailer based in the US, has an excellent social media support strategy. Have a look at twitter.com/Zappos_Service to see their personalised, effective and positive support strategy in action.

Brands should carefully consider whether all social media channels are appropriate for them, and be prepared for any eventuality. Brands that are well liked will generally have positive responses on social media, those that receive a mediocre response from consumers will have a bit of a mixed bag, but those that have a lot of support issues are likely to experience very large numbers of complaints that need to be addressed.

Social support staff should have access to all the historical data relating to customer issues – such as all the data collected about previous complaints and reference numbers. In this way, they can respond directly to the consumer in the social channel that they've selected and escalate the problem appropriately.

8.7.2 Social CRM and online monitoring

Social CRM can also make use of online reputation management and monitoring tools. Online monitoring, or reputation management, entails knowing what is being said about your organisation and ensuring that you are leading the conversation.

By using these tools, brands can rate and sort these mentions based on their sentiment. This allows them to effectively test the temperature of the online community's feeling towards the brand, which can then guide any future action.

8.7.3 Customer-centric vs. customer-driven organisations

Effective CRM places the customer's needs first in all dealings with the brand. However, there is a vast difference between a customer-centric organisation and a customer-driven one.

Placing the customer at the centre of an organisation's business planning and execution is different to having customers drive the direction of a business. Many new, web-based businesses rely on the latter, and actively encourage customers to take the lead and add value to the business.

Services such as Flickr (www.flickr.com) and Twitter (www.twitter.com) are user-driven rather than user-centric. They provide tools that enable users to make the service their own, often by allowing outside developers to create supplementary services. So, Flickr users can export their images and use them to make custom business cards on Moo (www.moo.com). There are many auxiliary services based on Twitter such as analysis services (www.klout.com) and access services (www.twhirl.org).

Savvy organisations can also provide tools to customers to drive their business, passing on tasks to customers that might ordinarily have been performed by the organisation. For example, many airlines now allow travellers to check in online prior to arriving at the airport. As more travellers elect to check themselves in, staff costs for airlines can be reduced. The travellers are doing the job for free (and are getting a better experience too).

PLEASE CHECK IN ONLINE NOW

It's nearly time for your trip but before you go you need to [check in online](#). Once you've checked in, remember to print your boarding passes and bring them with you to the airport.

If you've checked in online in the last 24 hrs, please ignore this reminder and we look forward to welcoming you on board soon

If you are not the passenger on this flight, please forward this email to the person travelling so they can check in online.

SOME REMINDERS

ON TIME
Make sure you allow yourself enough time to get to the airport. We recommend arriving at least 2 hours before you depart so you can get through security and to the boarding gate on time. Gates close 30 minutes prior to flight so please don't be late.

GETTING THERE
You can check travel info on our website. Or you can do it with our new [app](#) and [mobile site](#), perfect for checking your [booking](#) on the move.

PARKING
If you require parking at London Gatwick, check out options [here](#).

AIRPORT HOTELS
If you need to stay in a hotel near London Gatwick the night before, check out options [here](#).

BAGGAGE ALLOWANCE

CABIN BAG
You can bring on board 1 bag measuring 56x45x25cm.

HOLD BAGS
You can purchase hold allowance of 20kg per person.

BUGGIES AND CAR SEATS
Can be brought on board, and families with children can bring two items

[FIND OUT MORE](#)

Figure 2. A CRM email reminder to check in for a flight, from airline EasyJet.

Customer-centric strategy, on the other hand, uses data to present the best possible experience to the customer. Amazon's collaborative filtering is an example of a customer-centric approach. Using customer data, Amazon will share products that you are more likely to prefer.

What Other Customers Are Looking At Right Now

Product	Price	Rating
Sony Playstation 3 Slim 160GB	\$299.95	4.5 (860)
Kindle Paperwhite, 6" High Resolution...	\$119.00	4.5 (14,593)
Hoover WindTunnel 2 Rewind Pet Plus...	\$139.99	4.5 (28)
Google Chromecast HDMI Streaming...	\$35.00	4.5 (24)
Playstation 4 (PS4) Standard Edition Sony PlayStation 4	\$399.99	4.5 (11)
Google Nexus 7 FHD Tablet by ASUS	\$229.00	4.5 (41)

Figure 3. Amazon provides recommendations based on what customers with similar profiles are looking at.

Customer-centric experiences are about personalisation: using data to create a tailored experience for the customer. Customer-driven experiences are about customisation: providing the tools that let a customer tailor their own experience.

8.8 Step-by-step guide to implementing a CRM strategy

8.8.1 Step 1 – Conduct a business needs analysis

A major part of determining where to begin with a CRM implementation is having a clear understanding of the business needs, and where CRM would most benefit the organisation. CRM touches on sales, marketing, customer service and support both online and offline. It's important to review the needs of each business area so that you can determine your strategy for CRM.

Ideally you should have individual goals for each department – and all members within the organisation should buy in to the strategy in order to drive it successfully, from the highest rank to the lowest. Implementing successful CRM across the organisation is a process, with stakeholders making decisions collectively and sharing their views and needs. Decisions should be based on realistic budgets and resources and full calculations carried out before any kind of loyalty currency is decided upon.

8.8.2 Step 2 – Understand customer needs

CRM is about the customer. You might have identified a range of business needs, but what about the needs of the customer?

NOTE

Keep a close eye on consumer complaint sites (like hellopeter.com) to identify any significant or recurring issues.

Two elements of CRM in particular – **service delivery and customer support** – are actually all about meeting the needs of the customer. And what's the best way of determining customer needs? By asking them, of course. There are various ways to find out what customers want, but in all of them, it is important to listen. Use **online monitoring tools and insights from social media** to gather a more rounded view of what your customers think, feel and want. Look at past behaviour, churn rates, successes – a detailed data mining exercise could also be on the cards, as you will need to understand which of your customers is the most valuable and why.

8.8.3 Step 3 – Set objectives and measurements of success

CRM is a long-term commitment and you need to consider a long-term approach. Depending on the business needs, your objectives and success measures could include:

- Increasing customer numbers
- Increasing profitability per customer
- Increasing market share
- Improving responses to campaigns
- Raising customer satisfaction
- Improving end-to-end integration of the sales process cycle

The metrics you select for measurement will depend on these objectives. There are numerous metrics that you can choose from when measuring your performance, and the actual metrics you choose are generally referred to as your key performance indicators (KPIs).

NOTE

Read more about this in the *Data Analytics* chapter.

8.8.4 Step 4 – Determine how you will implement CRM

Once you've identified all of the objectives of your CRM implementation, you will need to determine how you are actually going to roll it out. What channels will you use? What touchpoints will you leverage? What data will you need for this? And what tools will you need to gather this data and implement your initiatives across these channels? How will you address the shift and communicate with your internal stakeholders before you launch the initiative to your external ones?

You will need to make choices based on what is available to you, or what you intend on embracing. The digital space offers a range of innovative spaces for CRM delivery; you simply need to get creative in your execution.

8.8.5 Step 5 – Choose the right tools

There are lots of excellent CRM tools available, but these are useless without a clear CRM strategy in place. You can only select your tools once you know what your objectives are, what touchpoints and channels you are going to utilise and what data you need to collect and analyse.

CRM systems that gather information on customer preferences and needs, as well as information on competitors and in the industry in general, let organisations focus on providing customer solutions instead of simply pushing products.

We've outline a host of options in the **Tools of the trade** section below.

8.9 Tools of the trade

Collaborative CRM tools

Collaborative CRM refers to a process that **combines customer data across all facets of a company**. For example, queries regularly submitted to the technical support or customer service arm of a business can be used to inform product development and website content. Instead of various departments collecting their own customer data and using this in isolation, data is collated so that all channels make informed decisions based on the holistic customer experience.

MindTouch (www.mindtouch.com) is an example of a CRM product that offers collaborative authoring. This means that multiple users can simultaneously edit shared documents while maintaining an audit trail and version control.

Social CRM tools

Social CRM tools perform a number of functions, from standardising the collection of data from social media channels to automatically posting links and accepting friend requests. These tools can also be used to identify customer sentiment within social media channels.

BrandsEye (www.brandseye.com), Radian6 (www.radian6.com) and Simplify360 (www.simplify360.com) are examples of social CRM listening tools that collect data on brand mentions across social media channels online, in real time.

Operational CRM tools

Operational CRM tools deal with the most obvious channels that relate to customers: **the front end of a business and its customer service**. From a web technology point of view, operational CRM informs the website a customer sees as well as their entire online user experience.

Two examples of operational CRM tools are OnContact (www.oncontact.com) and Zoho CRM (www.zoho.com/crm).

Sales and marketing automation CRM tools

Sales force automation uses CRM software to **manage sales cycles and to collect customer sales data**. The software enables businesses to track leads, schedule

transactions and communications with potential and existing customers, and generate detailed reporting on the sales process.

Marketing automation tools identify current customers and use their response information to manage email marketing lists. The tools can also identify prospects, as well as unhappy customers.

HubSpot (www.hubspot.com) offers a marketing automation tool that allows companies to generate and send behaviour-driven emails.

Analytical CRM tools

Analytical CRM tools allow companies to **record, save and investigate customer data** to better understand customers through their behaviour. For instance, data collected about the nature of visits to your website can be used to make informed decisions about where to focus attention based on customer behaviour. Past purchasing behaviour of customers can be analysed to predict future purchasing behaviour. Data can be used to segment customers and tailor communications.

These tools can help target marketing campaigns at customers and predict future sales and customer spending.

KXEN (www.kxen.com) is a popular analytical CRM tool with the ability to forecast customer behaviour and shed light on customer preferences and spending power. It also allows you to tailor marketing campaigns to specific customers, segmented by various demographics.

NOTE

Data can tell you *what* your customers are doing - it's your job to investigate this and to determine *why*.

8.10 Case study: Fuji Xerox

8.10.1 One-line summary

Fuji Xerox Thailand uses a traditional CRM system to improve their sales process.



8.10.2 The problem

Due to organisational growth and an increase in services offered, Fuji Xerox Thailand needed to find a more efficient way to gather and store customer data. The company was also under pressure to provide better business forecasting, which relied heavily on their ability to analyse accurate customer data (Sundae Solutions, 2012).

To achieve this, they decided to invest in a CRM system that would allow them to centrally store information and capture everything in one place.

Up until that point, they had used Excel spreadsheets and paper systems to record data, which lead to inaccuracies due to:

- Human error in recording in customer details
- Individual records being kept within different divisions

For the company this meant a loss of sales due to long turn-around times on quotes or discount requests. It also meant that information silos created obstacles to formulating long-term business strategies (Sundae Solutions, 2012).

8.10.3 The solution

By implementing an integrated CRM system, namely the Sage CRM solution, they created a centralised repository for information. Fuji Xerox also needed a system that would integrate well with their existing systems. These included an Oracle ERP system at the backend (Sundae Solutions, 2012).

The Oracle ERP system is an enterprise resource planning software solution that enables businesses to manage all facets of their organisation from development to manufacturing and sales. The company was also using Microsoft Office on their desktops, which means the system needed to integrate with Outlook calendars and email (Sundae Solutions, 2012).

The system offered contact and customer management functionality as well as sales force automation, and placed the focus on the customer and their needs (Sundae Solutions, 2012).

By implementing a CRM system of this nature, Fuji Xerox essentially enabled the sales team to manage their sales pipeline effectively.

Generally, CRM systems allow organisations to choose the exact sales process journey to follow by inputting information such as:

- The industry
- How long the sales cycle is
- The qualifying criteria for a sale
- The nature of the sales and how big they are
- How many team members are involved in the process
- What experience they have in their field
- How much managers need to be involved

8.10.4 The results

Through the new system, the sales team was empowered with information. This meant:

- More efficient sales management
- Speedier quotations
- Improved approvals processes

In the past, sales representatives could only submit quotes or discounts for approval to their managers back at the office, which would take a few days and decrease the likelihood of sales conversions. The new system meant sales representatives had software that would simulate cost, profit and discounts immediately. This meant quick preparation of quotes and confidence in knowing that these were accurate and made sound business sense.

The new CRM solution also meant quicker response times to sales and support queries, improving customer experience (Sundae Solutions, 2012).

After implementing the system, the Fuji Xerox sales teams saw an 8% improvement in customer satisfaction ratings. There was also clear revenue growth as a result of the initiative (Sundae Solutions, 2012).

8.11 The bigger picture

Managing customer relationships should be built into every marketing tactic and activity you perform, especially if your organisation has adopted CRM as an ongoing strategy to drive customer retention. In the digital space, here are some to watch out for.

Successful **email marketing** is built on two very basic customer needs: privacy and permission. The very first step in using email to communicate with a customer is gaining their permission. Data mining and segmenting customer databases allows email marketing to be tailored and personalised. Email is often the primary point of contact for service-related messages.

Online advertising is a double-edged sword when it comes to CRM. It can be a very effective acquisition tool for new customers, but intrusive advertising can attract attention for all the wrong reasons. Effective online advertising speaks to customers' needs and presents solutions to them, attracting attention without being overly intrusive. The key is to be relevant and useful wherever possible.

Affiliate marketing started by making the most of existing relationships other parties have with potential customers. Affiliate marketing can be an excellent sales and acquisition channel, but is not without its problems from a CRM perspective. Another entity is acquiring leads on your behalf, which can mean a loss of control.

Search engine optimisation and search advertising start with customer intent. Existing customer data can indicate where to focus search engine marketing efforts, especially when it comes to analysing how well a website caters to the intent indicated by a customer's search term.

Social media marketing is based on customer needs and preferences. It is also a powerful tool for turning delighted customers (who are expressive online) into advocates for an organisation. Social media creates new communication channels for an organisation, enabling discussions and customer service to take place where the customer feels most comfortable.

Effective web development and design starts with understanding and catering for customer needs, and should focus on the experience of the web user. Designing for customers first and foremost gives web visitors a seamless experience - CRM data can tell you what your customers need, and web experiences can support the customer journey. Web designers and developers can also create sophisticated customer service portals to manage CRM, such as the Nike+ support page: nikeplus.nike.com/plus/support.

Through all of the digital marketing tactics, **effective analytics is the most useful CRM tool**. It allows each channel to be measured on its merits, and the customers acquired by each channel can be analysed.

8.12 Summary

Customer relationship management is the cornerstone of your interactions with customers. Digital technology makes the process of discovering key insights seamless, effective and very useful, but CRM cannot be restricted to only digital channels as customer interactions happen offline too.

There are many benefits to implementing a CRM strategy – from reduced customer service costs to happier customers and more tailored and effective communications.

Naturally, understanding customers is the biggest outcome of CRM – and this understanding leads to meeting their needs much more effectively, which in turn has direct bottom-line benefits for the brand.

There are many facets to CRM that you should consider before deciding how you will approach it. The key ones are:

- Brand touchpoints – how do customers interact with the brand, and vice versa?
- The tools you need for your business – operational CRM, analytical CRM, collaborative CRM and sales force automation are the main categories.
- What channels are available to you to communicate with your clients?
- Implementations – CRM can be implemented for sales, marketing and customer support and service fulfilment.
- What are the steps you need to take within your organisation to ensure a successful CRM strategy?
- What cost are you looking at – and what return on investment are you expecting?
- Your long-term aims – CRM is never a short-term solution.
- What are your data capabilities and needs – are you gathering the correct data, storing it correctly, updating it constantly and then analysing it for insights?

8.13 Case study questions

1. What type of CRM solution did Fuji Xerox implement?
2. Which pitfalls and problems did the new CRM system solve?
3. What other potential improvements could the CRM system make in the long term?

8.14 Chapter questions

1. How do you think CRM changed or evolved as social media rose to popularity?
2. Why do customers respond so positively to personalised communication?
3. What ethical problems do you think customers might raise with regards to behavioural tracking?

8.15 Further reading

www.insidecrm.com – This useful website regularly posts white papers and reports breaking down updates and developments in the field of CRM.

www.churchofthecustomer.com – This useful blog regularly features guest writers and experts in the field of social media and CRM.

www.cluetrain.com – Home of the Cluetrain Manifesto, a set of guiding principles geared towards conducting business in the digital world.

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**WEBSITE ANALYSIS, DETAILED REPORT
AND STRATEGIC SOLUTION**

09

Search
Engine
Optimisation
(SEO)

What's inside: Understand how search engine optimisation has grown to be an important marketing tactic. Gain insight into the factors that affect the position of your website in search results pages and how you can go about improving this.

9.1 Introduction

With millions of people performing billions of searches each day to find content on the Internet (Sullivan, 2013), it makes sense that marketers want their products to be findable online. Search engines, the channels through which these searches happen, use closely guarded algorithms to determine the results displayed. Determining what factors these algorithms take into account has led to a growing practice known as search engine optimisation.

Search engine optimisation (SEO) is the practice of optimising a website to achieve the highest possible ranking on the search engine results pages (SERPs). Someone who practices SEO professionally is also known as an SEO (search engine optimiser).

NOTE

Other types of websites that rely on search, like YouTube and Facebook, will have their own algorithms. Facebook's News Feed Algorithm, for example, uses around 100 000 factors to rank and sort content that appears in a user's news feed.

Google says it uses more than 200 different factors in its algorithm to determine relevance and ranking (Avellanosa, 2012). None of the major search engines disclose the elements they use to rank pages, but there are many SEO practitioners who spend time analysing patent applications to try to determine what these are.

SEO can be split into two distinct camps: white hat SEO and black hat SEO (with, of course, some grey hat wearers in between). Black hat SEO refers to trying to game the search engines. These SEOs use dubious means to achieve high rankings, and their websites are occasionally blacklisted by the search engines. White hat SEO, on the other hand, refers to working within the parameters set by search engines to optimise a website for better user experience. Search engines want to send users to the website that is best suited to their needs, so white hat SEO should ensure that users can find what they are looking for.

In this chapter, you will learn:

- How search engines work and how they deliver results
- How to plan, research and implement an effective keyword strategy across text and other content
- Techniques for link building, an essential aspect of SEO
- How specialised search – such as mobile, social and local search – can affect your rankings, and how to optimise for these

9.2 Key terms and concepts

Term	Definition
Alt text	The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. Also called Alt Tag.
Anchor text	The visible, clickable text in a link.
App store optimisation (ASO)	The process of optimising mobile and web applications for the specific web stores in which they are distributed.
Backlink	All the links on other pages that will take the user to a specific web page. Each link to that specific page is known as an inbound/backlink. The number of backlinks influences your ranking, so the more backlinks the better – get linking!
Canonical	The canonical version is the definitive version. In SEO, it refers to a definitive URL.
Domain name	The easy-to-read name used to identify an IP address of a server that distinguishes it from other systems on the World Wide Web: our domain name is quirk.biz.
Flash	A technology used to show video and animation on a website. It can be bandwidth heavy and unfriendly to search engine spiders.
Heading tags	Heading tags (H1, H2, H3, etc.) are standard elements used to define headings and subheadings on a web page. The number indicates the importance, so H1 tags are viewed by the spiders as being more important than H3 tags. Using target key phrases in your H tags is essential for effective SEO.
Home page	The first page of any website. The home page gives users a glimpse into what your site is about – very much like the index in a book, or a magazine.
Hypertext Markup Language (HTML)	Certain HTML tags are used to structure the information and features within a web page.
Hyperlink	A link in an electronic document that allows you, once you click on it, to follow the link to the relevant web page.
Internet Protocol (IP) address	The Internet Protocol (IP) address is an exclusive number that is used to represent every single computer in a network.

Keyword frequency	The number of times a keyword or key phrase appears on a website.
Key phrase	Two or more words that are combined to form a search query - often referred to as keywords. It is usually better to optimise for a phrase rather than a single word.
Keyword rankings	Where the keywords or phrases targeted by SEO rank in the search engine results - if your targeted terms do not appear on the first three pages, start worrying.
Landing page	The page a user reaches when clicking on a paid or organic search engine listing. The pages that have the most success are those that match up as closely as possible with the user's search query.
Link	A URL embedded on a web page. If you click on the link you will be taken to that page.
Link bait	A technique for creating content that is specifically designed to attract links from other web pages.
Meta tags	Tags that tell search engine spiders what exactly a web page is about. It's important that your meta tags are optimised for the targeted key phrases. Meta tags are made up of meta titles, descriptions and keywords.
PageRank	Google's secret algorithm for ranking web pages in search engine results pages.
Referrer	When a user clicks on a link from one site to another, the site the user has left is the referrer. Most browsers log the referrer's URL in referrer strings. This information is vital in determining which queries are being used to find specific sites.
Robots.txt	A file written and stored in the root directory of a website that restricts the search engine spiders from indexing certain pages of the website.
Search engine spiders	Programs that travel the web, following links and building up the indexes of search engines.
Universal Resource Locator (URL)	A web address that is unique to every page on the Internet.
Usability	A measure of how easy it is for a user to complete a desired task. Sites with excellent usability fare far better than those that are difficult to use.
XML sitemap	A guide that search engines use to help them index a website, which indicates how many pages there are, how often they are updated and how important they are.

9.3 Understanding SEO

Search engines need to help users find what they're looking for. To make sure they list the best results first, they look for signals of:

- Popularity
- Authority
- Relevance
- Trust
- Importance

SEO, also called organic or natural optimisation, involves optimising websites to achieve high rankings on search engines for certain selected key phrases. Generally, techniques used for optimising on one search engine will also help efforts across others.

How search engines work, according to Google:

"PageRank relies on the uniquely democratic nature of the web by using its vast link structure as an indicator of an individual page's value. In essence, Google interprets a link from page A to page B as a vote, by page A, for page B. But Google looks at more than the sheer volume of votes, or links, a page receives; it also analyzes the page that casts the vote. Votes cast by pages that are themselves 'important' weigh more heavily and help to make other pages 'important'."

NOTE

A good place to keep track of Google search algorithm updates is this handy resource from Moz: moz.com/google-algorithm-change.

SEO can be divided into two main strategies:

1. **On-page optimisation** is achieved by making changes to the HTML code, content and structure of a website, making it more accessible for search engines, and by extension, easier for users to find.
2. **Off-page optimisation** is generally focused on building links to the website, and covers activities like social media and digital PR.

SEO is an extremely effective way of generating new business to a site. It is a continuous process and a way of thinking about how search engines see your website, and how users use search engines to find your website. It's search psychology.

Search engine optimisation is a fairly technical practice but it can easily be broken down into five main areas:

- A search engine friendly website structure
- A well-researched list of key phrases
- Content optimised to target those key phrases
- Link popularity
- User insights

9.4 Search engine friendly website structure

Search engines encounter two kinds of obstacles:

- Technical challenges that prevent the search engine spider from accessing content.
- A competitive marketing environment where everyone wants to rank highly.

NOTE

Read more about this in the *Web Development and Design* chapter.

To ensure that search engines can access your content, you must remove technical barriers. Those who want to achieve the best results must follow best practices. These best practices are outlined in the chapter on *Web Development and Design*.

The key is to make sure that there are direct HTML links to each page you want the search engines to index. The most important pages should be accessible directly from the home page of your website.

NOTE

Read more about this in the *User Experience Design* chapter.

The information architecture, or how content is planned and laid out, has important usability and SEO implications. Users want to find what they are looking for quickly and easily, while website owners want search engine spiders to be able to access and index all applicable pages. In fact, Google has released an update that penalises sites with poor user experience (such as no content above the fold, or a high bounce rate) [Cutts, 2012].

There are times when user experience and SEO can be at odds with each other, but usually if you focus on building usable, accessible websites, you have made them search engine friendly as well.

Another technical challenge to search engines is Flash. For the most part, search engines struggle to crawl and index Flash sites. There are some workarounds, but the best approach from an SEO perspective is to avoid building sites or delivering key content in Flash. Instead, use HTML5, which provides similar interactivity and visuals while remaining easily crawlable.

The chapter on web development and design delves more deeply into building a search engine friendly website.

9.5 SEO and key phrases

How do you start building your key phrase list? It requires a little thought and a fair amount of research and insight, using tools that are readily available to help you grow and refine your list of keywords.

Key phrases are the very foundation of search. When a user enters a query on a search engine, he or she uses the words he or she thinks are relevant to the search. The search engine then returns those pages it believes are most relevant to the words the searcher used – and, increasingly, the implied meaning of the search.

Search engines have built a sophisticated understanding of semantics and the way in which we use language. So, if a user searches for ‘car rental’, the search engine will look for pages that are relevant to ‘car rental’ as well as, possibly, ‘car hire’, ‘vehicle hire’, and so forth. Search engines have also built up knowledge around common misspellings, synonyms and related searches.

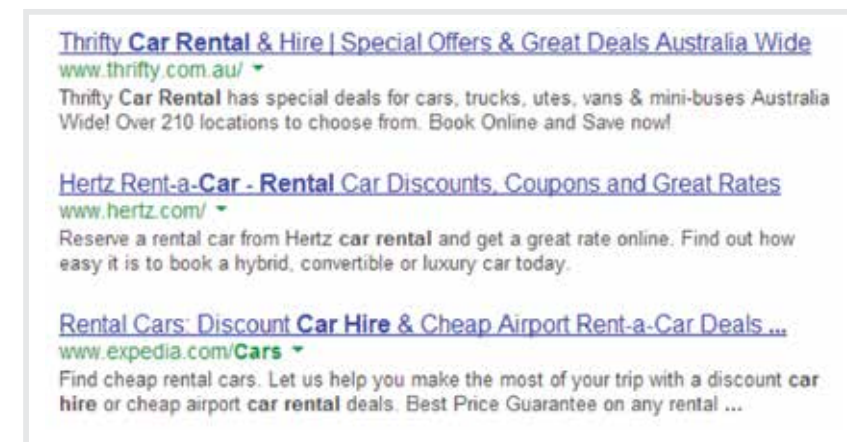


Figure 1. Google delivers search results for logical synonyms.

Because of this, it is crucial that you implement keywords that are likely to be used by their target audience. Websites need to appear when their potential customers are searching for them. A large part of keyword research is understanding search psychology. When we build our key phrase lists, we are tapping into the mental process of searchers and putting together the right mix of keywords to target.

NOTE

Read more about this in the *Web Development and Design* chapter.

NOTE

Keyword or key phrase? These are usually used interchangeably to refer to single or multiple words used for optimising websites.

NOTE

There are four things to consider when choosing a keyword:

Search volume

How many searchers are using that phrase to find what they want? For example, there is an estimated monthly search volume of over 338 million for the keyword 'hotel', but an estimated 6 600 searches per month for a key phrase such as 'Cape Town Waterfront hotel'.

If you're researching keywords using the Google AdWords Keyword Planner, note that it reports only on paid search volume, not on total volume.

Keyword	Competition	Global Monthly Searches	Local Monthly Searches
cape town waterfront hotels	High	6,600	390
cape town hotels waterfront	High	6,600	390
hotels cape town waterfront	High	6,600	390
hotels in cape town waterfront	High	6,600	390
cape town hotels	High	165,000	9,900
waterfront hotel cape town	High	6,600	390

Figure 2. The AdWords Keyword Planner shows the volume of global and local monthly searches.

Competition

How many other websites out there are targeting that same phrase? For example, Google finds over 2 800 000 000 results for 'hotel', but only 3 210 000 for 'Cape Town Waterfront Hotel'.

Propensity to convert

What is the likelihood that the searcher using that key phrase is going to convert on your site? A conversion is a desired action taken by the visitor to your website.

Related to propensity to convert is the relevance of the selected term to what you are offering. If you are selling rooms at a hotel at the V&A Waterfront, which of the two terms ('hotel' or 'Cape Town Waterfront hotel') do you think will lead to a higher rate of conversions?

Value per lead

What is the average value per prospect attracted by the keyword? Depending on the nature of your website, the average value per lead varies. Using the hotel example again, consider these two terms:

'luxury Cape Town hotel' and 'budget Cape Town hotel'

Both are terms used by someone wanting to book a hotel in Cape Town, but it is likely that someone looking for a luxury hotel is intending to spend more. That means that that particular lead has a higher value, particularly if you have a hotel-booking website that offers a range of accommodation.

9.5.1 Step-by-step key phrase research**Step 1: Brainstorm**

Think about the words you would use to describe your business, and about the questions or needs of your customers that it fulfils. How would someone ask for what you are offering? Consider synonyms and misspellings as well.

Bear in mind that people may not ask for your services in the same way as you describe them. You may sell 'herbal infusions', whereas most people would ask for 'herbal teas', and some might even request a 'tisane'.

Even common words are often misspelt, and you may need to consider common misspellings – for example, 'jewelry' or 'morgage'.

Showing results for **mortgage**
Search instead for **morgage**

Ad related to **morgage**

Free Mortgage Calculator 080 000 7111
www.betterbond.co.za/
Calculate Your **Mortgage** Repayments Let Us Help You Find The Best Bond

[Free Mortgage Calculator](#) [Bond FAQ](#)
[Apply Online Now](#) [Guide to Buying a House](#)

Mortgage loan - Wikipedia, the free encyclopedia
en.wikipedia.org/wiki/Mortgage_loan

A **mortgage** loan is a loan secured by real property through the use of a **mortgage** note which evidences the existence of the loan and the encumbrance of that ...
[Encumbrance - Mortgage law - Mortgage industry of the ... - Mortgage note](#)

Figure 3. Google returns relevant results even for common misspellings.

Step 2: Gather data

Two ways in which to gather accurate key phrase data are to survey customers and to look at your website referral logs.

Look to see what terms customers are already using to find you, and add those to your list. If they are already sending you some traffic, it is worth seeing if you can increase that traffic.

NOTE

Misspellings are important, but consider what these tell you about the traffic you are getting – analyse this traffic to ensure that you're getting quality visitors.

Step 3: Use keyword research tools

There are several tools available for keyword discovery, and some of them are free. Some tools will scan your website and suggest keywords based on your current content. Most will let you enter keywords, and will then return suggestions based on past research data, along with:

- Similar keywords
- Common keywords used with that keyword
- Common misspellings
- Frequency of the keywords in search queries
- Industry-related keywords
- Keywords that are sending traffic to your competitors
- How many sites are targeting your keywords

NOTE

Try it now: Pick one of the tools listed at the end of the chapter and try a little of your own keyword research. Can you discover any useful keywords that your favourite brand should be using?

See **Tools of the Trade** for some tools that you can use.

Bearing in mind the factors that make a good keyword, you need to aim for the right mix of keywords. Low-volume terms with low levels of competition may be a good way to get traffic in the short term, but don't be scared off by bigger competition in the high-value, high-volume areas. It may take longer to get there, but once you do, the revenue can make it all worthwhile.

It is a good idea to create a spreadsheet of the list of keywords, along with additional information about each one.

Keyword or phrase	Search volume	Competition	Propensity to Convert	Value of Lead
Hotel	3,870	90%	2%	\$18
Luxury hotels	345	80%	35%	\$35

Figure 4. Keep a spreadsheet of targeted keywords for reference.

This will help you to choose the right keywords to target. These lists should be created for the whole website, and can then be broken down for each page you want to optimise.

9.5.2 Optimising content for key phrases

Once keywords and phrases are selected, we need to ensure the site contains content to target them. You must ensure that the content is properly structured and that it sends signals of relevance. Content is the most important part of your website: create relevant, targeted content aimed at your selected key phrases.

As you know from the content strategy chapter, content already has several roles to play on your site:

- It must provide information to visitors.
- It must engage with them.
- It must persuade them to do what you want.

Now it must also send signals of relevance to search engines. You need to use the keywords on the content page in a way that search engines will pick up, and users will understand.

Each web page should be optimised for two to three key phrases: the primary key phrase, the secondary and the tertiary. A page can be optimised for up to five key phrases, but it is better to have more niche pages than fewer unfocused pages.

Here are some guidelines:

1. **Title tag:** use the key phrase in the title and as close to the beginning as possible.
2. **H1 header tag:** use the key phrase in the header tag, and as much as possible in the other H tags.
3. **Body content:** use the key phrase at least three times, more if there is a lot of content and it makes sense to. You should aim for about 350 words of content. But don't overdo it! That could look like spam to the search engines.
4. **Bold:** use tags around the keyword at least once.
5. **URL:** try to use the key phrase in your page URL.
6. **Meta description:** use it at least once in the meta description of the page, which should entice users to clickthrough to your site from the SERP.
7. **Link anchor text:** try to ensure that the keyword is used in the anchor text of the pages linking to you.
8. **Domain name:** if possible, use the key phrase in your domain name.

NOTE

Read more about this in the *Content Marketing Strategy* chapter.

Optimising media

NOTE

Read more about this in the *Video Marketing* chapter.

Images, video and other digital assets should also be optimised with the relevant keywords. Search engines cannot decipher multimedia content as well as text, so they rely on the way that media is described to determine what it is about. Screen readers also read out these descriptions, which can help visually impaired users make sense of a website. In addition, media such as images and video are often also shown on the SERPs. Proper optimisation can give a brand more ownership of the SERP real estate, and can also be used effectively to target competitive terms.

Just as rich media can help emphasise the content on a page to a visitor, they can also help search engines to rank pages, provided they are labelled correctly.

Here are some ways to optimise images with key phrases for SEO:

- Use descriptive, keyword-filled filenames.
- Use specific alt tags and title attributes.
- Add meta information to the image. Make sure this information is relevant.
- Use descriptive captions, and keep relevant copy close to the corresponding media. For example, an image caption and neighbouring text will help to describe content of the image.
- Make sure that the header tags and images are relevant to each other.

Also think about what other digital assets you have, and whether these can be optimised in line with your key phrase strategy. For example, consider app store optimisation (ASO) – the process of optimising your mobile and web apps for the specific web stores they are distributed in.

Here are some ways in which you can optimise your apps:

- Give your app a catchy name that also includes your most important keyword or phrase.
- Include a distinctive, recognisable and clear icon.
- Spell out the features and benefits clearly, including key phrases where possible.
- In your app store listing, add links to your major social media platforms and your website – and don't forget to link the other way too!
- Include as much meta data as you can, including tags, categories and descriptions (this will depend on the app store in question) (Bulygin, 2013).



Figure 5. An example of a page targeting the phrase 'handmade bags'.

The best way to ensure results is to focus on writing quality content while sticking to a few guidelines on tags and URLs. Remember, you want search engines to rank you highly for your content, but you also want to ensure that the content is a pleasure to read.

Regularly adding fresh, valuable content will also encourage the search engines to crawl your site more frequently.

Use your website and its pages to establish and reinforce themes. Information can always be arranged in some kind of hierarchical structure. Just as a single page can have a heading and then get broken down into sub-headings, a large website can have main themes that get broken down into sub-themes. Search engines will see these themes and recognise your website as one with rich content.

9.6 Link popularity

Links are a vital part of how the Internet works. The purpose of a link is to allow a user to go from one web page to another. Search engines, doing their best to mimic the behaviour of humans, also follow links.

NOTE

As search engines become ever more sophisticated and user focused, creating entertaining and readable copy will be much more important than simply including keywords in your text.

Besides allowing search engine spiders to find websites, links are a way of validating relevance and indicating importance. When one page links to another, it is as if that page is voting or vouching for the destination page. Generally, the more votes a website receives, the more trusted it becomes, the more important it is deemed, and the better it will rank on search engines.

Links help send signals of trust. Signals of trust can come only from a third-party source. Few people will trust someone who says, “Don’t worry, you can trust me!” unless someone else, who is already trusted, says, “Don’t worry, I know him well. You can trust him.” It is the same with links and search engines. Trusted sites can transfer trust to unknown sites via links.

Links help to validate relevance. Text links, by their very nature, contain text (thank you, Captain Obvious). The text that makes up the link can help validate relevance. A link such as ‘Cape Town hotel’ sends the message that, “You can trust that the destination site is relevant to the term ‘Cape Town hotel.’” If the destination web page has already used content to send a signal of relevance, the link simply validates that signal.

9.6.1 The parts of a link

Here is the HTML code for a link:

```
<a href="http://www.targeturl.com/targetpage.htm">Anchor Text</a>
```

- `<a href>` and `` are HTML tags that show where the link starts and ends.
- `http://www.targeturl.com/targetpage.htm` is the page that the link leads to. You should make sure that you are linking to a relevant page in your site, and not just to the home page.
- Anchor Text is the visible text that forms the link. This is the text that should contain the key phrase you are targeting.

The link sends a signal that the target URL is important for the subject used in the anchor text.

There is a lot more information that can be included in this anatomy, such as instructions telling the search engine not to follow the link, or instructions to the browser on whether the link should open in a new window or not.

```
<a href="http://www.targeturl.com/targetpage.htm" rel="nofollow">Anchor Text</a>
```

- `rel="nofollow"` can be included in links when you don’t want to vouch for the target URL. Search engines do not count nofollow links for ranking purposes. This was introduced by Google to try to combat comment spam.

9.6.2 Not all links are created equal

Of course, not all links are equal. While link volume is the number of links coming to a specific page of your site, link authority looks at the value of the links. Some sites are more trusted than others. So, if they are more trusted, then links from those sites are worth more. Likewise, some sites are more relevant than others to specific terms. The more relevant a site, the more value is transferred by the link. Well-known and established news sites, government sites (.gov) and university domains (.ac) are examples of sites from which links can carry more weighting. Links from websites that have a higher PageRank also carry more link weight.



Figure 6. Links from universities and government bodies carry more weight.

Search algorithms also consider relationships between linked sites. By analysing various things, the search engines try to determine if the links are natural links, or if they are manipulative, artificial links created solely for ranking purposes. Manipulated links are worth very little compared to natural links and may even lead to a drop in search engine rankings.

The search engine algorithm will also determine the relevancy of the referring website to the site being linked to. The more relevant the sites are to each other, the better.

Also consider that linking to valuable, relevant external resources can help to improve the visibility of your own site.

9.6.3 How does a website get more links?

With links playing such a vital role in search engine rankings and traffic for a website, everyone wants more of them. There are certainly dubious means of generating links, most of which can actually result in being penalised by the search engines. However, here are some ways for ethical and honest website owners and marketers (and that’s what you are) to go about increasing links to their websites.

DISCUSSION

Why are government and university websites considered to have more authority? What sorts of websites would they be likely to link to?

Create excellent, valuable content that others want to read

If people find your site useful, they are more likely to link to it. It is not necessary (or possible) to try to write content that will appeal to the whole of the Internet population. Focus on being the best in the industry you are in, and in providing value to the members of that community. Make sure that valuable content is themed around your key phrases.



Figure 7. Ensure that you create remarkable, valuable content that people want to link to.

Infographics are visual and graphic representations of data, and are a popular type of content that is useful to users, and can encourage lots of traffic and inbound links.

Create tools and documents that others want to use

Interview experts in your field, and host those interviews on your website. Create useful PDF guides for your industry that people can download from your site. Think outside the box for quirky, relevant items that people will link to. Calculators are popular tools, and we don't just mean the ones that add two and two together. If you have a website selling diet books, for example, create a tool which helps users to calculate their body mass index (BMI) and target weight. Importantly, be unique!



Figure 8. The BBC website has several interactive elements, such as this BMI calculator.

Create games

Creating a game that people want to play is a great way to generate links. Make sure that the theme of the game is based on the key phrases for your website, so that when others talk about and link to the game, they are using your key phrases.

Capitalise on software and widgets

Widgets, browser extensions and other software that users love to use all help to generate links for a website. Quirk has released a Mozilla Firefox extension called SearchStatus that is exceptionally useful to the SEO community. Each time someone mentions this SEO tool, they link to Quirk. People also like to include fun widgets in their forum signatures – create a widget, make sure that the link is included, and let people spread these around the web for you.



Figure 9. A forum user has included a widget in their signature, linking to an external website.

NOTE

Be creative! The best link-building strategies are those that provide value and automate the linking process as much as possible. The easier it is for someone to share your link, the more likely they are to do it.

9.6.4 Competitor analysis

You can find out who is linking to your competitors, and which non-competing sites are ranking highly for your key phrases. Use this information to identify sites to target for link requests.

NOTE

Try it now: Type in the URL of a brand you like along with one of the search operators above. How many sites are linking to them?

Using Google search, the following search operators can be used to find these links and websites:

- [Link:url.com](#)
- [Link:http://www.url.com/page.html](#)
- [Link:url.com -site:url.com](#)

With all link-building tactics, make sure that you use your key phrases when communicating. You will be telling people how to link to you, and ensuring that search engines notice your authority.

9.7 User insights

Search engines want their results to be highly relevant to web users, to make sure that web users keep returning to the search engine for future searches. And the best way to establish what is relevant to users? By looking at how they use websites, of course!

User data is the most effective way of judging the true relevance and value of a website. For example, if users arrive on a website and leave immediately, chances are it wasn't relevant to their query in the first place. However, if a user repeatedly visits a website and spends a long time there, it is probably extremely relevant. When it comes to search engines, relevant, valuable sites are promoted, and irrelevant sites are demoted.

How do search engines access this data?

Search engines use cookies to maintain a history of a user's search activity. This will include keywords used, and websites visited from the search engine. Search engines gather data on the clickthrough rate of results, and on bounce rates.

Site speed, that is, the performance of your website, is a contributing factor to ranking in Google. Google confirmed in April 2010 that this was one of over 200 ranking signals (Singhal, 2010).

So, what does this mean for SEO? When it comes to a website, it must:

- Be valuable enough to attract both visitors and links naturally
- Retain visitors and make sure they return to the website
- Convert visitors

9.7.1 Social and search

Social information is playing an ever-increasing role in search. Social content, such as Twitter messages or YouTube videos, can appear in the SERPs, and there is a growing indication of social influence on search rankings.

There are several social factors to consider when it comes to social and search.



Figure 10. A Google search for Coca-Cola turns up several social media profiles.

1. Use social media properties to dominate brand SERPs.

When someone searches for your brand name, you can use your social media properties to 'own' more of the results on that page, reducing the likelihood that a user will end up on a competitor's website instead. Use your brand name when naming Twitter and Flickr profiles, and Facebook and YouTube pages.

2. Social links are used as signals of relevance.

Links from social sites such as Twitter include "rel=nofollow". However, there is a strong indication that these links are in fact followed by search engines, and are used to determine relevance. If you focus on creating great content on your site and making sure that it is easy to share socially, you should see a result in your SEO efforts.

3. Personalised results are influenced by your online social network.

If you are logged in to a social network while searching (Facebook for Bing, or your Gmail account for Google), you could see results from or influenced by your social circle. In Bing, for instance, results can include indications of what your friends have previously liked or shared via Facebook. On Google, you may be more likely to see your friend's blog for relevant searches.

NOTE

Read more about this in the *Social Media Strategy* chapter.

4. Optimise for social search engines.

While Google is the biggest search engine worldwide, YouTube is the second biggest. Even within social properties, users still use search to find the content they are looking for. Content that is housed on these properties should be optimised for the relevant social search engine as well.

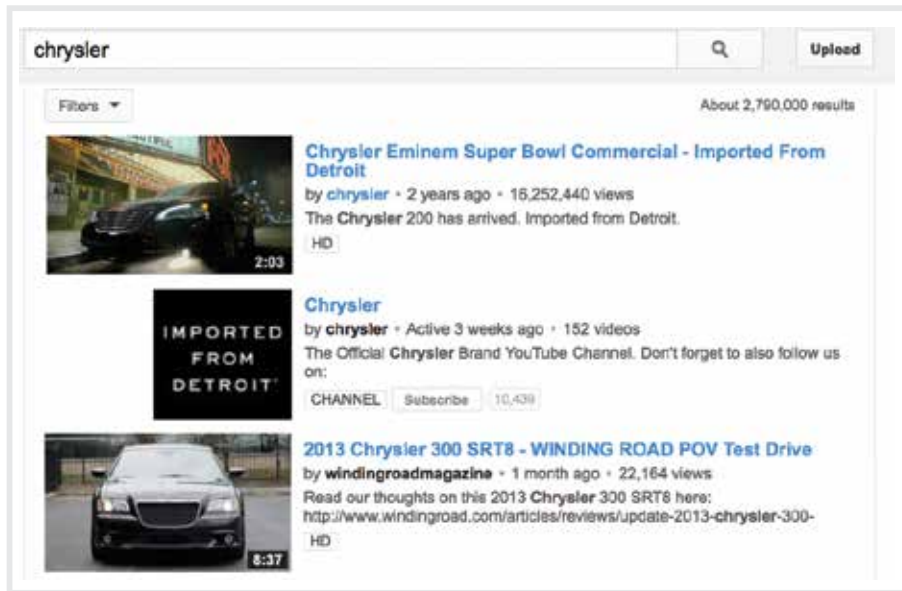


Figure 11. A YouTube search for 'Chrysler' turns up official branded videos in the top positions.

9.7.2 Mobile search

As web-enabled mobile devices continue to grow in the market, and become easier to use, mobile search remains a key growth area. Mobile searches tend to be different from desktop searches. They are more navigational in nature (users tend to know where they want to end up), and users are often looking for concise, actionable answers.

Mobile search input can also be different from desktop search. As well as typing in search keywords, mobile users can search by voice, or by using images or scanning barcodes.

NOTE

Read more about this in the *Web Development and Design* chapter.

As with mobile web development, mobile SEO is a little different from desktop SEO, although the fundamental principles remain the same. Build usable and accessible sites with great content, and you've already come a long way.

Where there are differences in approach for mobile SEO, these are largely because:

- Search engines have the ability to deliver precise location-based results to mobile users.
- Usability is critical in sites for mobile devices.
- Search engines have less data to work with (compared to traditional web) in terms of site history, traffic, and inbound links.

NOTE

Why is usability so important for mobile SEO?

The fundamentals of mobile SEO are not so different to those of desktop SEO.

1. A usable, crawlable site is very important.

Build mobile versions of your website that cater for mobile users: simple navigation and content stripped down to only what is required.

2. Content is important, and should be formatted for mobile usage.

Text and images should be optimised for the mobile experience – so no large file sizes! The meta data still matters: titles and descriptions are what users see in the SERPs.

3. Links are important.

You should link to your mobile site from your desktop site and vice versa. Submit your mobile site to relevant mobile directories.

4. Submit a mobile XML sitemap.

Mobile-specific sitemaps use the same protocols as standard XML sitemaps, with the addition of a mobile tag.

5. Use the word 'mobile' on the mobile website, or use mobile top-level domains.

Make it explicit to search engines that this is the mobile version of your website, and they are more likely to prioritise it as such.

9.7.3 Local search

Local search refers to search behaviour and results where location matters. Either results returned are local in nature, or results returned can be map based.

With blended SERPs, map-based results can be returned together with other types of results, depending on the type of search. As search engines become ever more sophisticated, location can be inferred and influence the type of results.

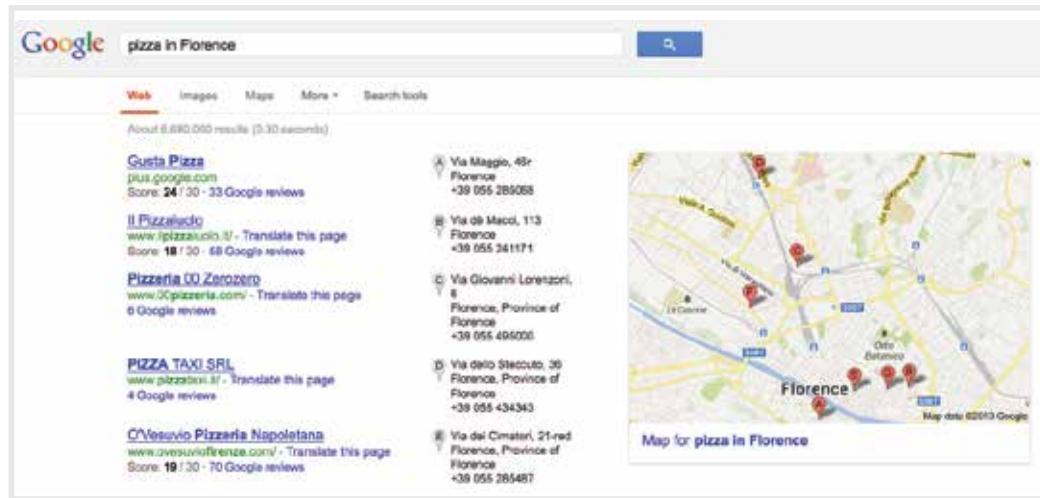


Figure 12. A Google search for 'pizza in Florence' turns up a range of location-based results, displayed on a map.

For example, a user may search for 'plumber london', and the search will know to return results for London plumbers. These may even be returned on a map. However, a user in London may search just for 'plumber'. The search can infer from the user's IP address that the user is in London, and still return results for London plumbers (since someone searching for this term is likely to be looking for a nearby service).

For search engines to return location-relevant results, they need to know the location of things being searched for. This is often determined from sites that include the name and address of a business. Note that this site may not be yours. Location results are often determined from various review sites, and the results can include some of those reviews.

Search engines also allow businesses to 'claim' their locations. A business can verify itself through a process with the search engine, and ensure that location information is correct. Google+ Local is a good example of this – the business can claim a listing, add their details, and even receive reviews.



Figure 13. A Google search for a specific business reveals its Google+ Local page in the SERP.

NOTE

Have a look for a location that's related to your business and see whether a Google+ page has been automatically set up by Google for it.

9.8 What not to do

Black hat SEO refers to practices that attempt to game the search engines. If a search engine uncovers a website using unethical practices to achieve search engine rankings, it is likely to remove that website from its index.

Google publishes guidelines for webmasters, available through Google's Webmaster Central (www.google.com/webmasters). As well as outlining best practice principles, Google has supplied the following list of don'ts:

- Avoid hidden text or hidden links.
- Don't use cloaking or sneaky redirects.
- Don't send automated queries to Google.
- Don't load pages with irrelevant keywords.
- Don't create multiple pages, subdomains, or domains with substantially duplicated content.

NOTE

Read more about this in the *Affiliate Marketing* chapter.

- Don't create pages that include malicious behaviours such as phishing or installing viruses, trojans, or other malware.
- Avoid 'doorway' pages created just for search engines or other 'cookie cutter' approaches, such as affiliate programmes with little or no original content. If your site participates in an affiliate programme, make sure that your site adds value. Provide unique and relevant content that gives users a reason to visit your site first.
- Avoid link farms and focus on attracting quality, valuable links.

The bottom line: design websites for users first and foremost, and don't try to trick the search engines. It will only be a matter of time before they uncover the black hat techniques.

9.9 Tools of the trade

There are a number of tools available to assist with SEO. Some are made available by search engines, and some are developed by agencies and individuals who specialise in SEO. Most are available for free.

Google Webmaster Tools

www.google.com/webmasters

Google provides guidelines to webmasters, and tools to help ensure your website is being indexed.

Open Site Explorer

www.opensiteexplorer.org

Moz provides a useful tool called Open Site Explorer, which can help you determine the value of links from particular sites.

Tools from SEOBook

tools.seobook.com

SEOBook provides a number of tools that assist any SEO. For example, Rank Checker is a Firefox extension that allows you to save a number of keywords and to perform regular searches on them, giving you the ranking of your chosen URL for each keyword in the search engines selected. They also have tools to help with keyword discovery.

Keyword discovery tools

There are a number of tools available, some free and some paid for, to assist with keyword discovery. Some include:

Google AdWords Keyword Planner

adwords.google.com/keywordplanner

Trellian's Keyword Discovery Tool

www.keyworddiscovery.com

Wordtracker

www.wordtracker.com

Wordtracker Keyword Questions

freekeywords.wordtracker.com/keyword-questions/

Microsoft Advertising Intelligence

advertise.bingads.microsoft.com/en-us/bing-ads-intelligence

SEO PowerSuite Rank Tracker (the trial version has limited functionality)

link-assistant.com

Online forums

Webmaster World (www.webmasterworld.com) is frequented by SEOs and webmasters aiming to stay current with latest trends and search engine updates.

Google Merchant Center

www.google.com/merchants

The Google Merchant Center allows you to mark up any products you sell through eCommerce, ensuring that they also rank for relevant search results.

SearchStatus

SearchStatus (www.quirk.biz/searchstatus) allows you to see a given website's Alexa and PageRank rankings.

9.10 Benefits and challenges

Optimising a website for search engines should entail optimising the website for users. Done properly, it should result in a better user experience, while ensuring that search engines index and rank the website well.

However, it can be tempting to focus on the technicalities of SEO while forgetting that both robots and humans need to read the same website. One should not be sacrificed for the other.

Search engines update their algorithms regularly. Each update is an attempt to improve search results, but can result in loss of rankings for some websites, depending on the update. A contingency plan, such as a prepared search advertising campaign, needs to be in place to cope with a sudden drop in rankings.

As with any digital marketing practice, SEO should not be the only focus of digital marketing efforts. It works best when part of a holistic online marketing strategy.

NOTE

The SEO community is constantly sharing insights about search algorithms - whenever a new one is released, do some research into the best ways to avoid being penalised.

9.11 Case study: Viewpoints.com and the Panda update

9.11.1 One-liner

Viewpoints.com recovers from a Google SEO update that halved its traffic and reinvents its business.

9.11.2 The problem

Viewpoints.com is an online portal for consumer reviews and product rankings. Launched in 2007, the website became very popular and, by 2011, was doubling its traffic year on year and had attracted over 2.7 million unique users. The site housed over 600 000 original product reviews that had been personally written by its 250 000 members, and the site was always run with good SEO practices taken into account.

In 2011, Google announced that it would be launching a new algorithm update called Panda – the aim was to penalise websites that were merely content and link farms and that did not provide any value to searchers. As mentioned in the notes, search engines are constantly tweaking their algorithms to stay a step ahead of SEO spammers and exploits, and the Panda update was another attempt to ensure Google was serving the most relevant and useful results.

Despite their good SEO practices, Viewpoints.com unexpectedly lost around 50% of their organic search traffic from one day to the next – because of the new rules of the Panda update. The company was then faced with the following challenges. They had to:

1. Understand what it was about their site that was harming rankings
2. Develop short- and long-term strategies to tackle these issues
3. Revamp the website user experience in line with the algorithm update

9.11.3 The solution

Viewpoints.com realised that it would take more than just a few little tweaks to fix their rankings – this would require a radical rethink of their entire approach to the website. They took on a multi-pronged approach and made some massive changes.

- In three months, they implemented quick fixes such as removing 40% of the ads on the site, improving the site speed threefold, and deleting over 80 000 low-quality reviews.
- To combat apparently thin content pages, they amalgamated short reviews onto single pages, eliminating over 600 000 unique pages from the site. Users were also given a minimum review length to cut down on one-line reviews.

- Viewpoints.com removed over 300 non-product-related categories (totalling 90 000 reviews) to focus on their core offering of product reviews.
- They focused strongly on optimising for mobile and social channels, echoing Google's own search focus.
- To improve site credibility, they eliminated over 15 unnecessary features from product pages, enforced user logins for reviewers, and completely redesigned the pages to be more usable.

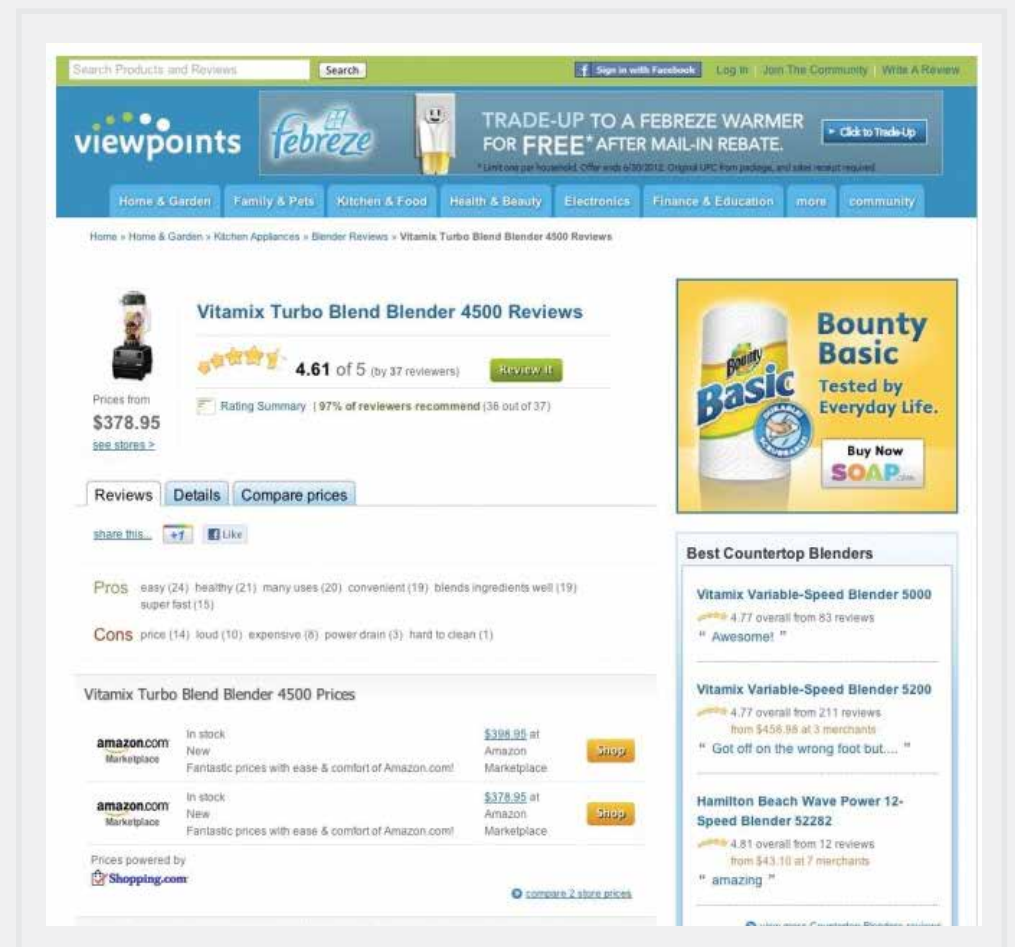


Figure 14. The old Viewpoints.com product review page.

The screenshot shows the Viewpoints.com product review page for the Vitamix Variable-Speed Blender 5200. The page layout includes a search bar at the top, a breadcrumb trail (Home → Explore → Blenders → Vitamix →), and a main product section. The product is a Vitamix #1 blenders brand, Type: Countertop Blenders, with a score of 96/100 based on 200 reviews. The price is \$429.99. The page also features a 'Best Countertop Blenders' section with other products like the Hamilton Beach Wave Power 12-Speed Blender and the Cuisinart PowerBlend Duet Blender.

Figure 15. The new Viewpoints.com product review page.

9.11.4 The results

Viewpoints.com did manage to recapture the vast majority of their earlier traffic. But more importantly, their business was improved as a result. They also challenged some fundamental issues with their website – which resulted in a more useable, user-friendly and contemporary site that delivered exactly what it promised (Moog, 2012).

9.12 The bigger picture

Search engine optimisation can be influenced and enhanced by most other digital marketing campaigns, and they should all be approached with this in mind.

SEO and content marketing go hand in hand, since SEO relies on fresh, relevant and popular content, and content marketing can be informed by SEO key phrases and insights.

For example, search advertising campaigns can provide valuable keyword research, which can then be fed into the SEO strategy. Social media marketing can generate an enormous amount of links to a website. Digital PR aims to generate links too, and these can be optimised for search engines.

User research and web analytics can generate insights into how users find the website, which can inform SEO strategy – and effective SEO techniques can provide insights into user behaviour.

9.13 Summary

The average website receives a significant proportion of its traffic from search engines, highlighting the importance of SEO.

There are two types of search results:

- Organic or natural results
- Paid results

SEO aims to improve a website's ranking in the organic results. Search engine optimisation is a fairly technical practice but it can easily be broken down into five main areas:

1. A search engine friendly website structure
2. A well-researched list of key phrases
3. Content optimised to target those key phrases
4. Link popularity
5. User insights

Growing trends in SEO include the influence of social content on search results, mobile SEO and local search.

9.14 Case study questions

1. Why do search engines constantly update their algorithms?
2. What were the key mistakes that Viewpoints.com was making?
3. Why were their solutions so effective?
4. Do you think search engine algorithm updates can help businesses become better at what they do?

9.15 Chapter questions

1. Why do links send signals of trust to search engines?
2. Why is it better to have more niche pages of content than fewer pages that cover a lot of content?
3. How can analysing the links to a competitor's website help aid your own link building strategy?
4. Why is it important for search engines to keep updating their algorithms?
5. If meta data are no longer used for ranking purposes, why do they still have an important role in SEO?

9.16 Further reading

www.moz.com – Moz provides regular articles, guides and blog posts covering all things SEO. As well as sharing insights from their own SEO efforts, there are also vibrant forums where you can learn from others.

www.seobook.com – Aaron Wall's SEOBook.com provides training and tools for SEO, as well as regular articles and posts.

www.webmasterworld.com – a forum for webmasters, from beginners to those who've been around. A great resource for a budding SEO.

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You can set a daily spending limit and an amount you are happy to pay for people to click on your ad. The price is chosen by you, not us, so you never have to worry about going over your budget.



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Control where and when they see it

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Australia: 1800 988 571
United States: 800 826 9988

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Create your account at **www.google.co.za/adwords** and enter the promotional code in the Billing tab. Or if you need help setting up your AdWords account, call one of our experts toll-free on **0800 166 483**

* TERMS AND CONDITIONS FOR THIS OFFER:

In order to activate this offer, you need to enter the promotional code through the Billing tab in your account. Promotional codes have no promotional value and entry of the promotional code serves only to begin your qualification for the associated promotional credit.

To qualify for the promotional credit you must accrue advertising charges in the amount of R200 within 31 days of entering your promotional code. For example, if you enter the code on January 1st, 2013 you'll have until January 31st, 2013 to accrue advertising charges in the amount of R200. In all circumstances, you must enter your promotional code within 5 weeks from when this offer was originally made in order to activate this offer.

Your account must be successfully billed by AdWords and remain in good standing in order to qualify for a promotional credit. The promotional credit will be applied within approximately 5 days of your account reaching the threshold for accrued advertising charges specified above, as long as you've activated your account using the promotional code and fulfilled all requirements stated in the offer. Once applied, the promotional credit will appear on the Billing summary page in your account. For the complete terms and conditions, see: <http://www.google.co.za/adwords/coupons/terms.html>

** Phone support available from 9:30 - 18:30 (local toll charges may apply). This offer is limited to advertisers based in South Africa. Support is available in English only. Offer subject to business and website qualification. If you are an established AdWords advertiser looking for help with your campaign, please visit adwords.google.com/support.

Vouchers are available with printed versions of the textbook,
and not with the online version.

10

Search Advertising

What's inside: An **introduction** to search advertising is followed by a look at the elements that make up a search advert. Learn how to **target properly the people you are intending to reach**. A **practical guide** will get you started on managing your own search advertising campaigns and utilising demographic and behavioural targeting, as well as **tracking** on your campaigns.

10.1 Introduction

Search advertising, also called pay-per-click (PPC) advertising, is a way to advertise your business or product directly on search engine results pages, where the advertiser pays only for each click on their advert.

Search advertising continues to evolve, and formats available range from simple text adverts through to rich media banners and even video adverts. PPC advertising revolutionised the online advertising industry, and today, search advertising generates 95% of Google's revenue (Peterson, 2013).

Adverts on search engines are easy to spot – they're clearly labelled as advertising and are separated from organic search results. They can appear on the top of the results page, usually in a box, and also on the right hand side of the results page.

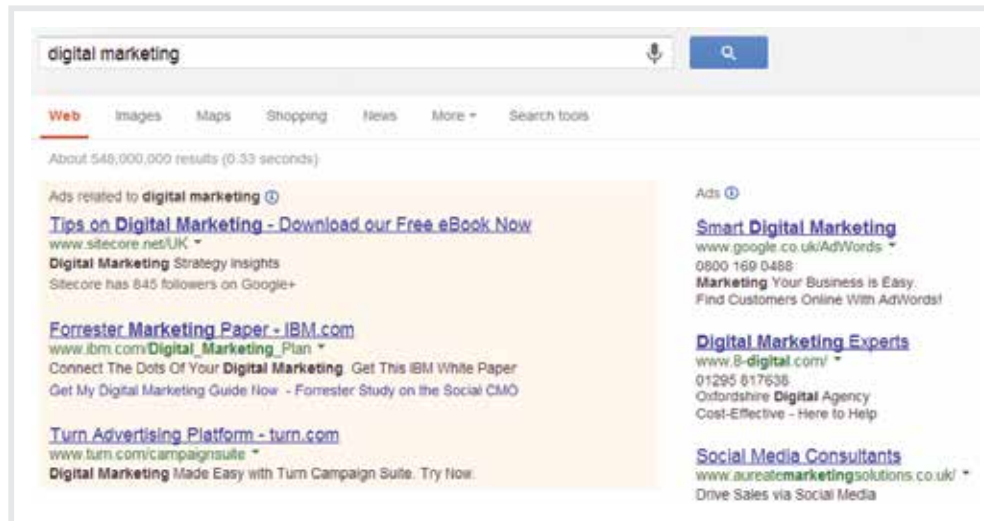


Figure 1. Search adverts appearing in a search for digital marketing.

Search advertising on search engines is keyword based – this means that it is triggered by the search term that a user enters into a search engine. Advertisers target the keywords for which they want to appear.

For the advertiser, the beauty of search advertising is that adverts are displayed when potential customers are already expressing intent – they are searching for a product or service. It allows advertisers to present their offering to a potential customer who is already in the buying cycle.

Google is, by a wide margin, the leader in the search advertising field; because of this, the chapter is very Google-centric, though the same principle should apply to any other search advertising platforms. Other platforms to be aware of are Bing, Yahoo and Baidu.

In this chapter, you will learn:

- How to put together a search advert
- How to target your search ad at relevant users
- The process of bidding on key phrases and how this affects your ranking
- How to plan, set up and run your own search advertising campaign

10.2 Key terms and concepts

Term	Definition
Clickthrough	A click on a text ad link that leads to a website.
Clickthrough rate (CTR)	The total clicks on a link divided by the number of times that ad link has been shown, expressed as a percentage.
Conversion rate	The number of conversions divided by the number of visitors, expressed as a percentage.
Cost per action (CPA)	The amount paid when a certain action is performed by a user.
Cost per click (CPC)	The amount paid when a link is clicked on.
Google AdWords	Google's search advertising program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
Impression	Each time an advert is shown.
Key phrase	Two or more words that are combined to form a search query - often referred to as keywords.
Keyword	A word found in a search query. For example, a search for 'blue widgets' includes the keywords 'blue' and 'widgets'.
Organic results	Also known as natural results. Search results served by the search engine's algorithm. The search engine does not charge website owners to list these results.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click on the advert.

Quality score (QS)	A measure used by Google AdWords to indicate how relevant a keyword is to an ad text and to a user's search query.
Return on investment (ROI)	The ratio of profit to cost.
Search term	The keywords a user enters when searching on a search engine.
Search engine results page (SERP)	The actual results returned to the user based on the search query.
Sponsored results	Search engine results that are paid for by the advertiser.

10.3 Advertising in search

Search engines display results to search queries based on proprietary algorithms. Each major search engine uses its own formula to determine what results to display for any term. According to PEW Internet, 73% of all Americans use search engines, and 59% of them use search engines daily; on top of that, 91% of people who use search engines say that they find the information they are looking for most or all of the time [Purcell, et al., 2012]. With search engines getting so much traffic, and delivering so much value, they need to find a way of generating revenue.

With so many search engines out there, which platform should you choose?

There are some small differences from platform to platform in terms of editorial policy, and each system has a different user interface. There is some theory that different platforms are better for different industries, for example, that Yahoo fares better than Google on travel advertising. However, this is subjective, and most large advertisers will run PPC campaigns on a number of platforms. As with most things in digital marketing, it is all about testing.

Google AdWords is the best known and is considered the industry standard; it allows users to transact in the currency of their choice, is tied to a comprehensive analytics tool, and offers training programmes and certifications. Google AdWords also currently has the best contextual and geographical targeting worldwide, although geo-targeting is also offered by Bing Ads, Facebook Ads, LinkedIn Ads and YouTube video ads (which is closely linked to AdWords).

10.3.1 Structuring your search advertising campaign

When you start running search advertising, you shouldn't just create a whole stream of ads – you need to have a plan.

Your AdWords account is your home for all the ads you are currently running, and it should be structured to reflect your business and marketing strategy. Within your account, organise your search adverts in groupings – called campaigns – according to your strategy and the ads you are running. Within each campaign, you should have ad groups – these are sets of ads that have a common characteristic or focus. For example, if you are selling books online, you may have ad groups focused around a specific genre, author, event and special offer, as well as some ad groups around general themes such as promoting local stores, or making online sales.

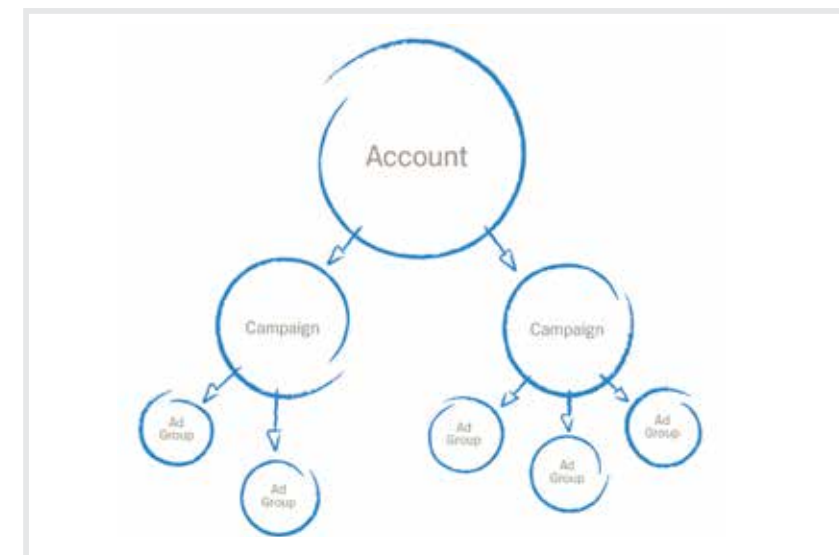


Figure 2. The main constituents of an AdWords campaign. (Source: Google, 2008)

Structuring your account in this way will help you to easily oversee your advertising spend, determine the effectiveness of your ads, manage your ads and bids, and switch off any ads that aren't working effectively.

NOTE

Many search advertisers create ad groups for branded terms, competitor terms and generic key phrases related to the industry.

10.4 The elements of a search ad

Basic search adverts all follow a similar format:

Heading

Two lines of advert copy.

Sometimes shown on one line.

www.DisplayURL.com

Ad extension

As you can see, these consist of several elements – the key is to make these work together harmoniously in order to get searchers to click through to your website. The three main components are:

- Keyword-optimised ad text
- The link to your owned property (website, social media platform, content)
- Ad extensions

10.4.1 Ad text

The ad text is the main component of a search ad. Search engines limit the characters in each line. There are also restrictions on what you are allowed to write in an advert. Here are some of the editorial guidelines from Google AdWords:

- Heading: maximum of 25 characters
- Line 1: maximum of 35 characters
- Line 2: maximum of 35 characters
- Display URL: maximum of 35 characters
- No repeated exclamation marks.
- No word may be written in capitals only.
- No nonsense words may be used.

NOTE

These character limits and guidelines are very strict - if you fail to adhere to them, Google simply won't publish the ad.

- No claims of 'best', 'number one' or superlatives may be used unless they can be verified by a reliable third-party source.
- Product numbers may be used.
- No phone numbers allowed in the copy.

Writing effective copy

For most PPC adverts, the advert copy is the only tool available to attract attention, convey a message and entice action. This is why writing effective advert copy is such an important skill for search advertising.

People who are searching for something usually have a specific intent – they are looking for information, guidance, comparisons, tools, or solutions to their problems. It's important to understand why somebody would look for your brand or product – and what keywords they would use to find it – when crafting your search ads. Look at the considerations for choosing keywords that are covered in the *Search Engine Optimisation* chapter – these often overlap.

Use compelling and well-crafted **Calls to Action** so that users know what to do and what to expect: 'try now', 'sign up now', 'buy now'.

Many advertisers test offers in the advert copy, such as a discount or limited-time voucher. Product or service benefits make for good advert copy, such as free shipping, secure shopping or fast delivery.

If you are running many ads at once, it can be quite a lot of work to create unique copy for each one. Dynamic keyword insertion (inserting the search keyword dynamically into the advert copy that appears) or using the keyword in the advert copy can help. Dynamic keyword insertion takes the keyword in your campaign that matches with the user search query and inserts it into the ad automatically. This way, the ad looks more relevant to the user than a generic ad. The search engine will mark words that match the search term in bold, making the advert stand out a little bit more.

The downside of using dynamic keyword insertion is that you have less control over when an ad is shown to a user, and the results may not be as good as with a standard SEM campaign. The goal is to generate as many clicks as possible, but sometimes the advertiser is better off with fewer, high-quality clicks that generate actual sales.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

NOTE

Read more about this in the *Writing for Digital* chapter.

The long tail

Moz, a respected SEO blog, asserts that 70% of searches on the web are unique (Moz, 2012). This means that the sum of searches that are unique is higher than the sum of non-unique searches. Looking a little more closely at search terms will show a small number of high-volume searches, and then a large number of lower volume searches stretching out to those unique searches.

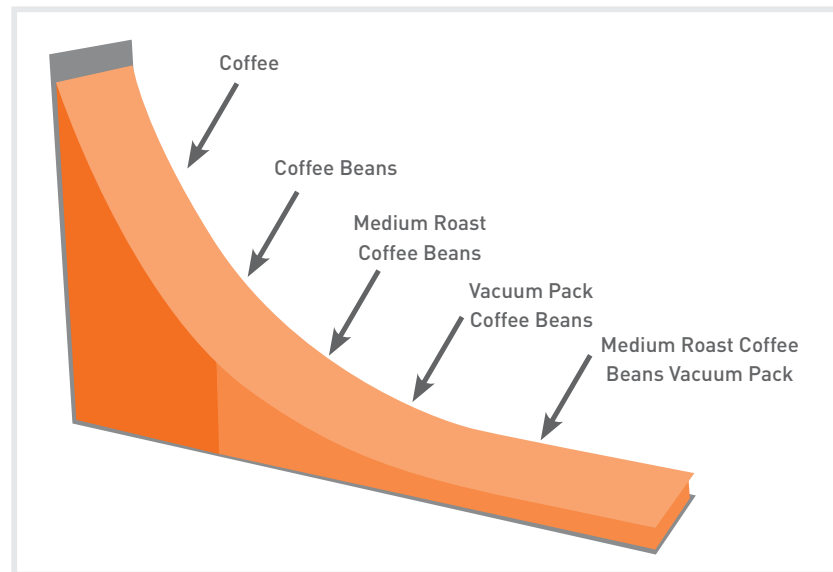


Figure 3. An example of long tail keywords.

NOTE

This is sometimes referred to as the long tail of search. Discovering these low-volume, niche search terms can do wonders for a search advertising campaign. Generally there is not much competition for these search terms, and the search term itself is very much targeted, so it will likely be cheaper to bid on and may yield a high conversion rate. While long-tail phrases are generally cheaper and lead to a higher rate of conversions, you will need to use a much larger number of them to make up for the lower traffic volume that they generate.

Also consider that search engine users may be at various stages of the buying cycle, and it could be worthwhile to craft a long-tail keyword strategy targeting those who are at the end of the buying cycle and know specifically what they are looking for.

What's more important to your brand - a high volume of traffic, or a smaller number of qualified leads? Consider your strategy when deciding whether to use short or long-tail keywords.

For example, if you sell cameras, targeting the term 'camera' may not bring in much targeted traffic (since someone searching for 'camera' may be looking for information, pictures, price comparisons, or even something completely unrelated). But someone looking for 'buy Canon DSLR camera in London' has a clear intention in mind and could be a great target for advertising.

10.4.2 Display URL

Search ads allow you to include a display URL. The URL shown is not necessarily the URL that the user will click through to – the display URL (what is shown on the advert) actually directs to the destination URL (what the actual URL of the page is). The display URL is sometimes also called a vanity URL.

NOTE

The display URL should be short, clear and meaningful to the viewer. It should indicate what type of page the user will be taken to if they click.



Figure 4. A Google search advert with a clear display URL.

The display URL must be the same domain as the destination URL. Google will show only one advert per domain.

The page that the user is taken to is called the landing page, which can be any page on your website, not necessarily the home page. The aim should be to send users to a web page that is as specific to their search, and the PPC advert, as possible. This is known as **deep-linking**.

Landing pages

Search advertising is not just about creating adverts and bidding for keywords. The process continues once a user has clicked on your advert. The page that the user reaches by clicking on an advert is called a landing page – either an existing page on your website, or a new custom-built page for the campaign at hand (useful if you are running a competition or special offer).

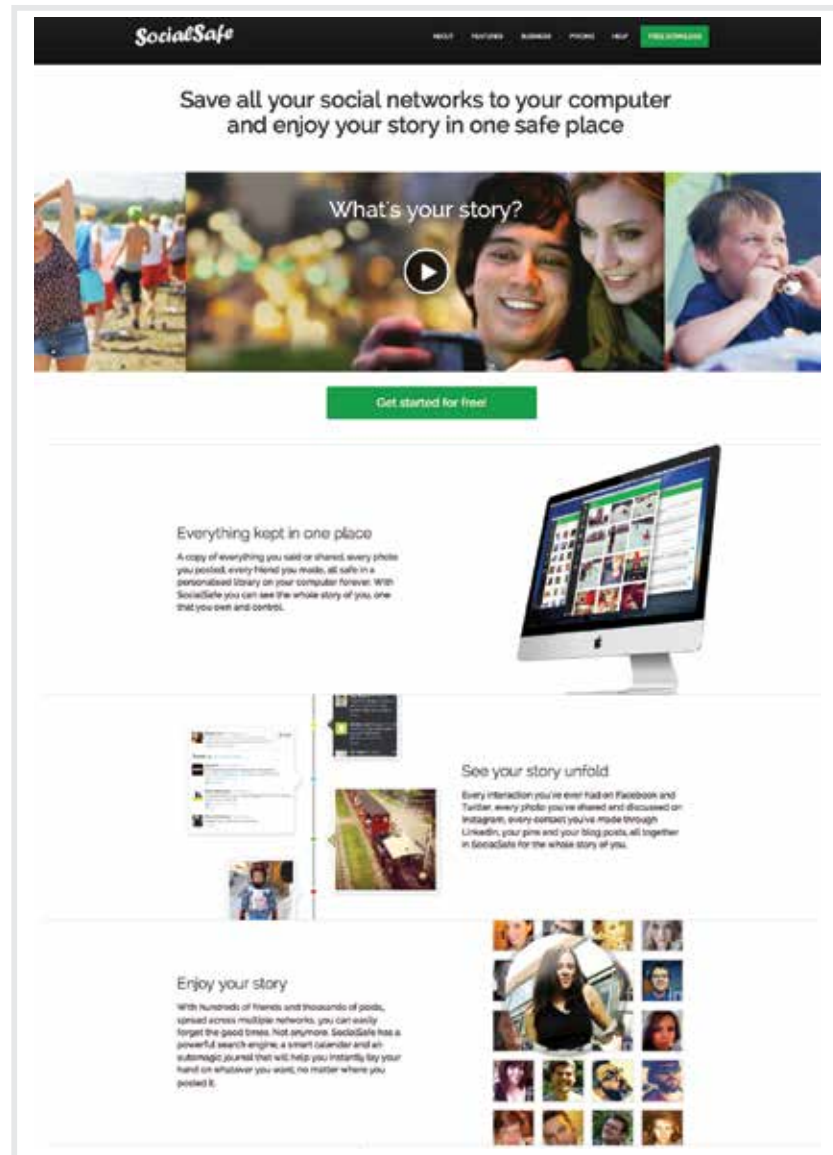


Figure 5. The Social Safe landing and home page.

Landing pages can make or break an advertising campaign. Poorly executed PPC campaigns will send all users to the home page of a website. Campaigns that convert will make sure that users land on a page that is relevant to their search with a very visible Call to Action. The aim is to keep the user as focused on the goal – conversion – as possible. Sending users to the home page gives them too many other options to choose from.

For example, if someone searched for 'Canon EOS 450D', a poorly run campaign would send that user to www.canon.co.uk.

A better campaign would have the user clicking through to www.canon.co.uk/ForHome/Product_Finder/Cameras/Digital_SLR/EOS_450D/index.asp.

Landing pages also indicate relevance to the search engine, which can increase the Quality Score of the advert, and in turn lower the cost per click (CPC) of the keyword. Adding keyword-rich pages to the website can also have SEO benefits.

PPC campaigns often have thousands of keywords, which can mean that you will have a lot of landing pages to build. Creating dynamic landing pages means that with a simple script, unique keyword-rich landing pages can be created for every search. The script will take the keyword that the searcher has used, and insert it in predefined places on the landing page. The user will then be landing on a page that is highly relevant to their search.

10.4.3 Ad Extensions

Google offers several ways to add value or information to search adverts. These are referred to as Ad Extensions. For a search advertiser, the Ad Extensions offer a way to get additional information into a search advert without affecting standard advert copy limits.

AdWords currently offers seven text Ad Extensions:

1. Location Extensions

Location extensions allow you to add location information and maps to your advert. To use the extensions, you can either insert your address manually or link your AdWords account to your Google+ Local (www.google.com/local) account.

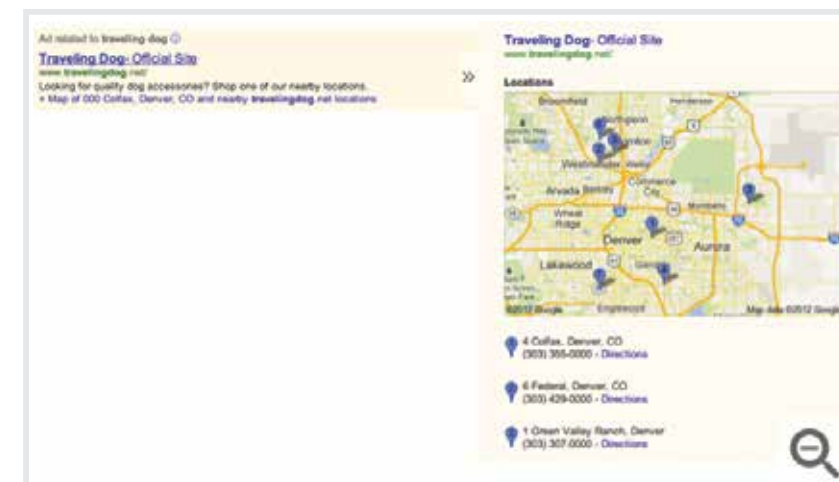


Figure 6. A location extension.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

NOTE

Google is constantly testing and adding new Ad Extensions – check in often to see what's new.

2. Call Extensions

The call extension allows you to display a local phone number in a line below the standard text advert. This is particularly effective in mobile ads, where the user can click and call directly from their phone.



Figure 7. A call extension. (Source: Google)

3. Social Extensions

The social extension indicates how many Google+ users have +1ed or followed the brand. This provides added social relevance on search results and is also a contributor to ad quality score.



Figure 8. A social extension. (Source: Google)

4. Seller Ratings

Google will match the domain used in the advert to review sites and display rating information together with your text ad. This is very useful if you have excellent ratings!



Figure 9. A seller rating extension. (Source: Google)

5. Sitelinks

Sitelinks allow you to display up to six additional links, each with a unique destination URL, with your advert. Each link is limited to 35 characters. Sitelinks allow you to direct users to more relevant areas of your website, all from one advert. They are suitable for advertising on more general or branded keywords.



Figure 10. An example of an advert with sitelinks extensions. (Source: Google)

6. Offer Extensions

By linking your AdWords account to your Google Merchant Center account and supplying a product feed, you are able to include product images in your search adverts when available. This is particularly useful for eCommerce advertisers.



Figure 11. An offer extension. (Source: Google)

7. Image Extensions

At the time of writing, these are still in beta, with only a few advertisers allowed to use them. These allow images in ads to extend, so that advertisers can promote products through an image directly from the ad itself.

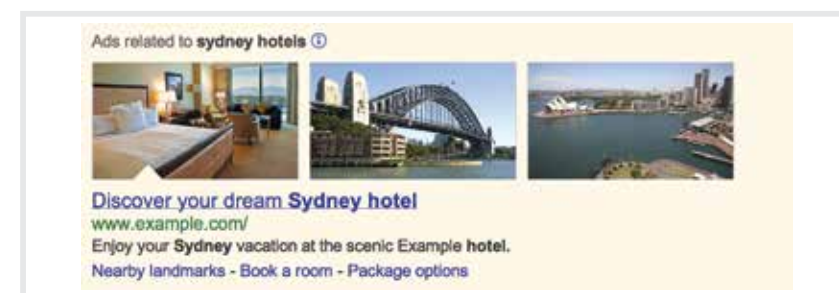


Figure 12. An example of an image ad extension. (Source: Google)

NOTE

Read more about this in the *Social Media Channels* chapter.

NOTE

Not all countries have access to the Google Merchant Center - check in occasionally to see if yours has been added.

10.5 Targeting options

Search adverts are targeted in a variety of ways, depending on how you want to reach your intended audience. Targeting your adverts means you know that the traffic you are getting is relevant to your product.

10.5.1 Keywords and match types

It's not enough simply to pick the right keywords; you need to know about the different ways in which the search engine interprets and matches the search term to your chosen keyword.

Most search engines require the advertiser to enter the search keywords for which their advert should appear.

Considering the massive volume of searches conducted every day, it would be impossible to determine all the possible terms potential customers might use to find you. That is why there are different keyword match types for search advertising.

Google AdWords using the following match types:

NOTE

These queries are similar to those used in online monitoring, also called ORM. Read more about this in the *Market Research* chapter.

- Broad match
- Broad match modifier
- Phrase match
- Exact match
- Negative match

Broad match means that your advert will appear for the keywords you have entered, as well as search terms that contain your keywords and any other words in any order, as well as some variations of your keywords (such as misspellings and synonyms).

The **broad match modifier** is an additional targeting option that gives you tighter control than broad match (by excluding synonyms but including other versions of the word, such as plurals). It's implemented with a + before the keyword.

Phrase match, which is denoted with quotation marks around the keywords ('phrase match') means that your advert will appear only for search terms that have your keywords in them, in the same order, though other words may also be in the search term.

Exact match, denoted by square brackets ([exact match]), means that the advert will appear for search terms only exactly the same as the keywords selected.

Negative match, denoted by using a dash in front of the keywords (-negative), means that your advert will not appear in searches using that word, no matter what other words are used.

Match type	Special symbol	Example keyword	Ads may show on searches that	Example searches
Broad match	none	women's hats	include misspellings, synonyms, related searches, and other relevant variations	buy ladies hats
Broad match modifier	+keyword	+women's hats	contain the modified term (or close variations, but not synonyms), in any order	woman's hats
Phrase match	"keyword"	"women's hats"	are a phrase, and close variations of that phrase	buy women's hats
Exact match	[keyword]	[women's hats]	are an exact term and close variations of that exact term	women's hats
Negative match	-keyword	-baseball	are searches without the term	baseball hats

Figure 13. How search engines interpret and match search terms. (Source: Google)

Advertisers can assign as many keywords as they want to an advert, but only one advert for each URL will be shown. If two advertisers are bidding to show adverts for the same domain, only one will be shown. Which advert will be shown is based on the bids being placed and on the quality of the adverts – more on that later.

10.5.2 Language and location targeting

Search engines have versions customised for specific regions and languages, based on the user's settings and where in the world they are searching from. As a search marketer, you can choose the language and the location of the search engine to target. This is known as geo-targeting.

For example, you may want your advert to show only to English searches in Asia, or to French searches in Johannesburg. Targeting your advert means that your ads won't be seen by people outside your target area, and you won't pay for traffic that you cannot convert into customers.

10.5.3 Behavioural and demographic targeting

Search advertising can also be targeted based on personal behaviour.

Using AdWords, you can re-target visitors who came to your site via an AdWords advert based on actions that they took. This means that if someone came to your site, but did not complete a purchase, you can target adverts to them in the SERPs (or through other online advertising channels, such as the Google Display Network). This is called re-marketing or re-targeting, and can be very effective for remaining top of mind until the user is ready to convert. It is usually advisable to cap the number of times a re-marketing ad is shown to an individual to avoid annoying them.

NOTE

Read more about this in the *Online Advertising* chapter.

10.6 Bidding and ranking for search ads

As you know, search adverts are charged on a per-click basis. The cost that you pay for every click is determined by a variety of factors, and is based on a bidding system.

The different advertising platforms offer advanced bidding options, all aimed at helping you to run your advertising campaign better. You can bid for placement on the SERP, or you can bid based on how much you are willing to pay per click. You are also able to tailor your approach to, for example, bidding for adverts during certain times of the day only.

NOTE

A Vickrey action is a sealed auction where bidders do not know what bids others have placed.

Search advertising is usually run as a Vickrey auction model, so advertisers place bids to appear based on certain criteria. The advertising platform determines when adverts are eligible to appear and serves them as appropriate. The advertiser then pays the advertising platform when their advert is clicked on.

Advertiser	Bid price	CPC
A2	\$3.00	\$2.51
A1	\$2.50	\$2.36
A3	\$2.35	\$2.06

Figure 14. Three advertisers bidding on the same key phrase.

With search advertising, the advertiser:

- Creates the copy for an advertisement.
- Determines the landing page for the advert.

- Selects the keywords or criteria for which that advertisement should appear.
- Chooses the maximum amount – the cost per click (CPC) – that they are willing to pay for a click on the advert.

The advertising platform:

- Checks the advert for compliance with editorial guidelines.
- Displays the advert for relevant search queries or other criteria.
- Determines the rank of the advert based on the advertiser's maximum bid and the relevance of the advert (which includes factors such as clickthrough rate, ad copy, keyword and landing page relevance).
- In Google AdWords, as well as deciding on your CPC bids for your keywords, you are able to set budgets for your campaign. You can set daily budgets, monthly budgets, or no budget. Once your total is reached, your adverts no longer run, so you can be sure that you never overspend. If you are concerned about overspending, you can set a daily budget. However, this can mean that your adverts do not run as often as you would like them to.

10.6.1 Conversion and clickthrough rates

Search engines look at factors such as relevancy to try to ensure that it is not just advertisers with deep pockets that can land the top ad listing. Search engines need to ensure that users find the adverts relevant, otherwise they'll be less likely to click on them – and no click means no revenue for the search engine.

Studies repeatedly show that those adverts nearer the top of the page attract the highest clickthrough rates (CTRs) (Soames, 2013). Competition for these top spots can be fierce and the cost per click can be very high.

Ads at the top of a page generally have the following qualities:

- They are very relevant to a user's search query.
- They consistently perform well, with high CTRs over time.
- The CPC bid is competitive and outbids other ads of the same quality.

(Google AdWords, 2013)

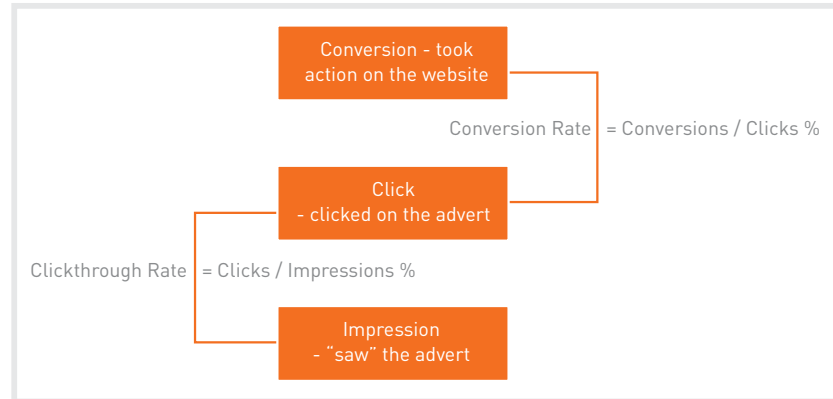


Figure 15. An image illustrating clickthrough and conversion rates.

You may think that more clicks are better, but is this necessarily the case? Being in the top position means that you may pay more per click. When your advertising budget is limited, it is often more cost effective not to bid too much for your keywords and to occupy the lower ad positions. Because you'll pay less per click, you can achieve more clicks (and potential customers) for your limited search advertising budget.

Advertisers need to consider what a user does after clicking through to the advertiser's website from the search engine. When planning a search advertising campaign, it is therefore crucial to set the goals of the campaign upfront, and make sure that these are attainable. With a goal set up, the advertiser can track how many of the users that clickthrough to the website follow through to that goal. This is called a conversion.

NOTE

A goal can be anything that is valuable to your brand - it doesn't have to be a direct sale.

Goals can be:

- Buying a product
- Filling in a form or quote
- Downloading a white paper
- Sending an enquiry
- Booking a flight

We know that the CTR of an advert is the number of clicks out of the total impressions.

The conversion rate of an advert is conversions divided by clicks.

The cost per action (or the cost per each conversion) is the total cost of the campaign, divided by the number of conversions.

The average cost per click is the total cost of the campaign divided by the number of clicks.

As the advertiser, you also need to know the value of each conversion. If the value of a conversion is less than the cost of achieving it, you effectively lose money with every conversion. Knowing the value to your business of a conversion will enable you to run search advertising campaigns profitably.

	Impressions	Clicks	CPC	Total Cost	CTR	Conversions	Conversion Rate	CPA
A	1134	55	\$ 0.89	\$ 48.95	5%	5	9%	\$ 9.79
B	1134	123	\$ 1.36	\$167.28	11%	11	9%	\$ 15.21
C	2256	225	\$ 0.89	\$ 200.25	10%	11	5%	\$ 18.20

Figure 16. Adjusting bidding strategies based on business principles.

10.6.2 The bidding process

Advertisers need to determine the maximum they are willing to pay for a click on their advert, and they need to decide this for each keyword they enter for an advert. This bid is the maximum cost per click (max CPC).

However, this will not necessarily be the CPC that the advertiser *must* pay for a click. Every time a search query is entered, the search engine runs an auction to determine the placement of the adverts where advertisers have bid on that search term. This auction is known as a Generalised Second Price (GSP) auction, which is a variation on the Vickrey auction.

In the GSP auction, each advertiser will pay the bid of the advertiser below him, plus a standard increment (typically \$0.01), for a click on their advert.

Say three advertisers, A1, A2 and A3, bid \$2.50, \$3.00 and \$2.35 respectively on the same keyword. The search engine has set a minimum price of \$2.05 on that same keyword. Here is how the adverts would be positioned, and what they would each pay for a click:

Advertiser	Bid price	CPC
A2	\$3.00	\$2.51
A1	\$2.50	\$2.36
A3	\$2.35	\$2.06

10.6.3 AdWords Quality Score

When it comes to ranking, of course, it's not quite as simple as that (it rarely is!). As well as the bid an advertiser places on a keyword, the search engine will take a number of other factors into account. In the case of Google AdWords, this is known as Quality Score. Quality Score is applied on a keyword, ad group and account level. It is important that your entire account has a good Quality Score, as it affects ranking and the cost per click.

The Quality Score is determined by, among other factors:

- The relevance of the keyword to the search term.
- The relevance of the advert copy to the search term.
- The relevance of the landing page to the search term.
- The historic CTR of that advert.

NOTE

Quality Score is ranked as follows:

- **Great (8, 9, 10):** Keyword is very relevant and QS needs no improvement.
- **OK (5, 6, 7):** Keyword is relevant, but can still benefit from a higher QS.
- **Poor (1, 2, 3, 4):** This keyword isn't very relevant and QS needs improvement.

Another way to think of the Quality Score is as a discount that is applied to your campaign. For instance, an advert with a great Quality Score can achieve a top position at a lower bid than a competing ad with a poor Quality Score; for example, an advertiser with a Quality Score of 5 will have to pay twice as much for a certain position as an advertiser with a Quality Score of 10.

10.7 Tracking

In order to report on campaigns all the way through to conversion, you need to use appropriate conversion tracking. Conversion tracking is usually accomplished with a small tracking pixel that is placed on the conversion confirmation page of the website.

Google AdWords offers conversion tracking tags, which will allow you to report on AdWords campaigns from impression through to conversion. The AdWords interface provides a wide range of useful reports.

In order to track many other networks, however, third-party tracking needs to be used. Most ad serving technology will also enable pay-per-click tracking (usually at a nominal additional cost per click). If you are running display campaigns through these networks as well, this has the benefit of reporting on how the campaigns might influence each other.

If you are sending traffic to a website that uses Google Analytics, you can use campaign tracking to track and report on campaigns that are driving traffic to the site. You can link your AdWords and Analytics accounts to share information across these platforms (such as the cost paid per click in Google Analytics and some basic analytics information in AdWords).

10.8 Planning and setting up a search advertising campaign

1. Do your homework

For a successful campaign, you need a full online and offline analysis of the business, customer demographics, industry and competitors. While it is relatively quick to set up a campaign, pre-planning will show dividends later. You need a brand, an identity and a clear, unique selling point. You get only three lines to advertise, so you need to make sure you know what must be included and how to make the most impact.

2. Define your goals

You need to know what you want to achieve with your search advertising campaign. Branding campaigns, for example, are very different from campaigns to increase sales. What do you want users to do once they click on your advert?

3. Budget, cost per action (CPA) and targets

Determine how much you are willing to spend to achieve your goal – your target CPA. Decide how much budget you are going to allocate to your search advertising campaign. If your goal is to increase revenue, your budget may be unlimited as long as revenue is increasing and you are within your target CPA.

4. Keyword research

You need to determine what keywords potential customers are likely to use when searching for the service that you offer. Along with that, you need to know:

- What common misspellings a customer might use.
- What words would show that they are not likely to purchase from you (words such as 'free' and 'cheap').

As part of your keyword research, you need to look at expected volumes for your keywords, so you know how to bid. There are also tools that will show you similar or related keywords, so you can expand your keyword list even further. See **Tools of the trade** (below) for some suggestions.

5. Write the adverts

Using your keyword research, write compelling adverts to promote your products. Adverts can be unique to one keyword, or you can group them and have a number of keywords for one advert.

Make sure you use an appropriate display URL, and that you target the landing page for each advert.

6. Place your bids

Based on your goals and keyword research, set the maximum bids for your keywords. Don't set these too high at this stage – you'll tweak the bids as you test your campaign. That being said, don't make them too low either, or you won't get much traffic, and it could affect your Quality Score. Test your ad to find the right balance in line with your goals. AdWords also provides tools that can help guide your decisions.

7. Tracking

Get your tracking tags in place, especially any conversion tracking tags.

8. Measure, analyse, test, optimise!

With tracking in place, you can analyse your ROI down to a keyword level, and then focus your campaign and budget on the keywords that are converting best.

NOTE

Consider seeing how changing the text, image or video of your advert can increase the CTR, or your conversion rate. Test different landing pages to see what converts better.

Test the networks too. Your Bing campaign may perform better than Google, or your Facebook account may drive cheaper traffic. Always keep your goals in mind and work, work, work to achieve them.

10.9 Tools of the trade

The foundation of search marketing is keyword research, and there are a number of tools that will help you grow your keyword list, and also to determine keyword volumes. Some are free and some are paid for. All these tools should be used as guidelines only – they usually provide trends and estimates rather than specific values. Test the data with your own campaigns to determine what works best for you.

Keyword volume tools

- www.freekeywords.wordtracker.com
- tools.seobook.com/general/keyword

Keyword suggestion tools

- adwords.google.com/keywordplanner (free account required)
- www.keyworddiscovery.com/search.html
- tools.seobook.com/keyword-tools/seobook/

Google AdWords has an Ad Preview Tool, which allows you to see whether your advert is appearing on the page (without using the search engine and thereby skewing quality score data). This can be accessed at adwords.google.com/select/AdTargetingPreviewTool.

Some paid services that aid with keyword research are:

- www.wordtracker.com
- www.advancedwebranking.com

Also consider other ways to research your industry and brand – for example, Google Trends (<http://google.com/trends>) can show keyword search volume over time.

Spreadsheets, such as Microsoft's Excel, are useful to aid you in building your keyword lists. Getting to grips with functions such as Concatenate and Vlookup will be useful.

10.10 Advantages and challenges

There are many reasons why search advertising can be an excellent addition to any digital marketing strategy.

- **No to low cost barrier**
You pay only for traffic; there are usually no setup fees involved; and all the tools you need to start out with can be accessed free.
- **Tracking every cent**
Search advertising allows you to track your advertising spend down to a keyword level, so you can learn what works and what doesn't on a micro scale.
- **Targeted advert placement**
You can make your advertising relevant – by using filters, targeting your ads to specific people, or even in the way you use keywords and match types.

- **You're giving your customers what they want**

Search advertising lets you put your advert in front of people who are searching for your product. It lets you provide a solution, as opposed to creating an interruption.

Search advertising campaigns are quick to set up, can provide high volumes of traffic, and are highly trackable. But there are some pitfalls that you ought to be aware of.

- **Click fraud**

Click fraud occurs when your advert is clicked on by someone who is not a legitimate potential customer. Because an advertiser has to pay for every click, sometimes unscrupulous competitors can click on the advert to force the payment. There are even automated bots that can click on adverts, costing advertisers millions.

Search engines have taken measures to combat this and click fraud is no longer widely prevalent. Advertisers can report suspected click fraud, and the search engines will refund invalid or fraudulent clicks after investigation.

What can you do? Keep an eye on your campaign. Any sudden leap in CTR should be investigated, and you should pay particular attention to see if the conversion rate drops (which would indicate potential fraud). Pause the campaign if you suspect fraud, and alert the search engine.

- **Bidding wars and climbing CPCs**

High-traffic keywords are expensive, and the battle to stay on top means that the CPC of these keywords is escalating. Convincing yourself that it's number one or nothing can result in burning through your campaign budget quickly, with nothing to show for it.

Keep focused on your campaign goals and ROI, and keep investigating to find [cheaper] niche keywords that work for you.

- **Keeping an eye on things**

Search advertising campaigns require a lot of monitoring, and the bigger your campaign gets, the more time this takes. Search advertising can provide a fantastic ROI, but you need to check in and tweak regularly to make sure that it continues to perform for you.

10.11 Case study – 'Sister Act' on Broadway

10.11.1 One-line summary

'Sister Act' on Broadway increased online ticket sales by using entertainment-focused video adverts.

10.11.2 The problem

'Sister Act' on Broadway, a well-known and popular show, needed to increase ticket sales. Just under a third of tickets were sold on their website, SisterActBroadway.com, so they needed to increase online traffic to meet this goal. Apart from on their website, tickets were also being sold on broker sites alongside other show tickets. These websites were not always correctly updated or professionally laid out. Potential theatre goers could also be distracted by competing shows and book for those instead. If the 'Sister Act' Broadway website was positioned as the official site to buy tickets, theatre goers who set out to watch the show could purchase without distraction (Google, 2012).

'Sister Act' on Broadway teamed up with SpotCo, an entertainment advertising agency, to meet these challenges (Google, 2012).

10.11.3 The solution

SpotCo needed to bring the entertainment aspect of Broadway to an online audience to entice them to book. For their online efforts, the agency chose to draw theatre goers with Media Ads (Google, 2012).

Media Ads are video ads served on Google, specifically designed for the entertainment industry. They are also unique in that instead of selecting keywords, Google's automated process serves ads to users whose search queries match the advert title. These adverts are also charged at a flat-rate cost per click, unlike most search advertising, where advertisers bid on key phrases (Google, n.d.).

These video ads can be viewed in high definition and expand to fill much of the viewer's screen, greying out the background to hold the viewer's attention. These ads are displayed in the top position, occupying more real estate than regular search ads. This space was used to deliver key messages, including pertinent information and a preview thumbnail (Google, 2012).

Other promotional efforts included cast changes, a TV promotion, a 'Nun Run' flashmob in Central Park and a confessional booth in-theatre where theatre goers could share their 'Sister Act' experience (Google, 2012).

10.11.4 Results

Around 14% of searchers interacted with the Media Ad video, with a good percentage of them watching the video. These efforts resulted in 20% more ticket sales on the official site and double the search marketing return on investment delivered the previous year (Google, 2012).

10.12 The bigger picture

Search advertising and search engine optimisation (SEO) should go hand in hand to create an effective search engine marketing strategy. The greater the part of the search results page that you own, the better.

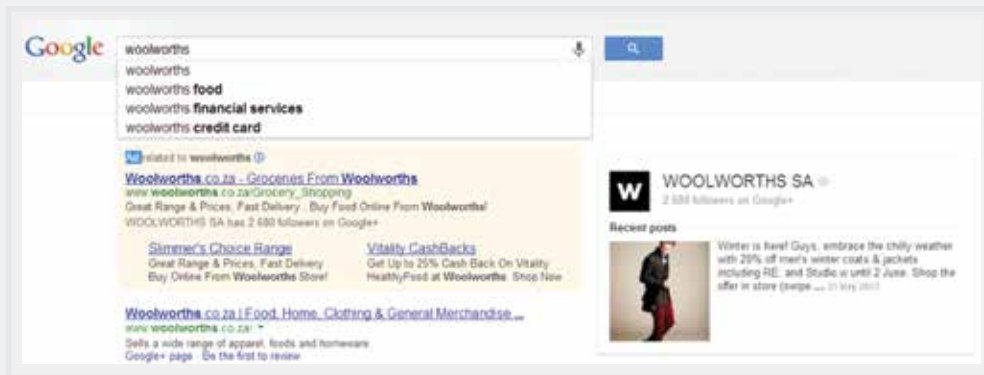


Figure 17. Brand search ads and organic results appearing together.

Search advertising is an excellent source of keywords and conversions. This insight can be used to improve the SEO of a site, as you will already know the relevance of these keywords to your intended audience. In turn, improved SEO rankings and social media interactions can help to reduce the CPC of your search advertising campaign, improve your Quality Score and raise your CTRs throughout.

Search advertising can also help to give your brand immediate search engine presence for your offline campaigns, when these might not yet be highly ranked in the natural search results. Search advertising can also be used together with online crisis management. If a company is unable to combat negative search results through the natural rankings, they are always able to bid for search adverts that can present their view.

Having a firm grasp of search advertising on search engines will provide a good foundation for running digital advertising campaigns across other networks and ad types.

10.13 Summary

Search advertising is advertising on the results pages of search engines where an advertiser typically pays for each click on an advert. These adverts consist of text, links and Ad Extensions. They are listed above and alongside the organic search results, and are marked as adverts so that users are aware that these are paid-for listings.

Search advertising is targeted according to keywords, demographics, behaviour or interest. On search engines, the CPC is determined by an auction.

The success of an advert may be determined by its CTR, but the success of a campaign will be determined by its conversion rate and its ability to achieve a target CPA. After all, it's not enough for people just to click on your adverts – you want them to take specific actions on your site once they get there.

10.14 Case study questions

1. Why were video ads such a great choice for this marketing campaign?
2. Media Ads are sold on a fixed-rate cost per click – how does this differ from typical cost-per-click search advertising?

10.15 Chapter questions

1. Why would competitors commit click fraud?
2. When should you use certain search types for AdWords, and why would this matter? How does it affect the number of conversions?
3. Why should one use relevant landing pages when running a search advertising campaign, and how does this affect the number of conversions?

10.16 Further reading

www.ppchero.com – This website contains practical step-by-step guides to improving your search campaigns and provides regular posts on all things search marketing.

www.searchengineland.com – This blog covers not only search advertising, but the entire spectrum of search engine marketing, providing useful insights for all your search activities.

support.google.com/adwords/?hl=en – This is where you can find information related to Google AdWords and other search advertising concepts.

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11
Online
Advertising

What's inside: An **introduction** to online advertising, a brief **history** following the development of the Internet and an exploration of **how it works**. We look at **types of display advertising**, **payment models**, **advertising networks** and **exchanges**. We also explore **ad servers** and what they do and learn more about how **tracking** works. We **put it all together** and take a **brief look at the future of online advertising** followed by an exploration into its **advantages** and **disadvantages**. Finally we include a **summary**, a look at the **bigger picture** and end off with a **case study**.

11.1 Introduction

Online advertising, simply put, is advertising on the Internet. Online advertising encompasses display adverts found on websites, adverts on search engine results pages (covered in the chapter on *Search Advertising*), adverts placed in emails and on social networks, and other ways in which advertisers use the Internet. Of course, this is not just limited to computers – digital advertising can be found anywhere you access the web, for example, through mobile devices.

The main objectives of online advertising are to increase sales, improve brand awareness and raise share of voice in the marketplace. It is based on the simple economics of demand and supply. Advertisers aim to stimulate a consumer need (demand) and then satisfy that need (supply).

Online advertising, naturally, follows web user behaviour. Advertisers want to place their adverts where potential customers will see them. Digital advertising is not limited to one specific medium or location – it can be placed almost anywhere on the web and can consist of images, text, videos, interactive elements, and even games.

Although the Internet provides new scope for creative approaches to advertising, we see its true advantages when we realise how trackable (and therefore measurable) Internet advertising is. It is possible to track all interactions with the advert itself: the number of impressions served, how many clicks it received, post-click-and-view data, and how many unique users were reached. This leads to valuable data that can be used to make sensible, effective business decisions.

In this chapter, you will learn:

- The various business objectives you can meet with online advertising
- All about the various ad formats, payment models and ad types available
- How and where to publish your adverts
- How to run an online advertising campaign step by step

11.2 Key terms and concepts

Term	Definition
Ad server	The technology that places ads on websites.
Animated GIF	A GIF (type of image file) which supports animations and allows a separate palette of 256 colours for each frame.

Banner	An online advertisement in the form of a graphic image that appears on a web page.
Clickthrough rate (CTR)	Click Through Rate = Clicks / Impressions %
Conversion	A visitor completing a target action.
Cost per acquisition (CPA)	Refers to the cost of acquiring a new customer. The advertiser pays only when a desired action is achieved (sometimes called cost per acquisition).
Cost per click (CPC)	Refers to when an advertiser pays only when their ad is clicked on, giving them a visitor to their site – typically from a search engine in pay per click search marketing.
Cost per mille (CPM)	Amount paid for every 1 000 impressions served of an advertisement.
Display network	Content websites that serve pay per click adverts from the same provider, such as AdWords.
Google AdWords	Google's PPC program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
HyperText Markup Language (HTML)	A language read by web browsers. Certain HTML 'tags' are used to structure the information and features within a web page. As an example, HTML emails usually contain graphics and can be interactive.
Internet protocol (IP) address	The Internet Protocol (IP) address is an exclusive number which is used to represent every single computer in a network.
Internet service provider (ISP)	Internet Service Provider – this is the company that provides you with access to the Internet, for example, MWEB or AOL.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Marketplace Ads	Facebook ad space units, a type of advertising available on Facebook.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click of the advert.
Popup	Unrequested window that opens on top of the currently viewed window.
Tracking	Measuring the effectiveness of a campaign by collecting and evaluating statistics.
Tracking code	A piece of code that tracks a user's interaction and movement through a website.
Traditional media	Newspapers, magazines, television and publishing houses are the realm of traditional media.

Unique selling point (USP)	Unique selling point (or proposition) – what makes your offering different to your competitors’.
Viral video	This is a video that becomes immensely popular, leading to its spread through word-of-mouth on the Internet via email, social networks and other hosting websites.
Web analytics	A software tool that collects data on website users, based on metrics to measure its performance.
Web browser	This is what allows you to browse the World Wide Web. Examples of browsers include Internet Explorer, Chrome, Safari and Firefox.

11.3 Online advertising objectives

Advertising, whether online or offline, has a number of objectives.

11.3.1 Building brand awareness

NOTE

Making people aware of a brand or product is an important long-term goal for any marketer. Once customers know about it, they are more likely to trust the brand. The better known a brand is, the more business it can do. And the ultimate goal is to sell more of the product or service.

Online advertising is largely visual, making it an ideal channel for promoting brand imagery and making people familiar with its colours, logo and overall feel.



Figure 1. A banner ad that raises awareness.

11.3.2 Creating demand

Creating customer demand is a three-step process: inform, persuade and remind. Customers can't want what they don't know about. Advertising needs to convince them about what they should want and why they should want it. Online advertising provides a great way to communicate the unique selling points (USPs) of a product, helping to stimulate demand and reminding customers about the product and why they want it.



Figure 2. A banner ad that creates demand for a new product.

11.3.3 Satisfying demand

Once somebody wants a product, they need to find out how to satisfy that desire. At this point it is important for the marketer to show the customer how their particular brand or product will best meet that need.



Figure 3. A banner ad that meets the customer's need to save money.

11.3.4 Driving direct response and sales

All forms of digital marketing need to drive traffic and sales in the long term. However, the immediacy of online advertising also drives traffic and sales in the short and medium terms. Unlike traditional media advertising, online advertising can turn the potential customer into an actual customer right there and then. What's more, it is possible to measure accurately how effective the online advertising campaign has been in this regard.

11.4 The key differentiator

Online advertising is able to drive instant sales and conversions. Unlike other advertising mediums, the consumer can go from advert to merchant in one easy click. Because of the connected nature of the Internet, online activities are highly trackable and measurable, which makes it possible to target adverts and to track and gauge the efficacy of the advertising accurately. Each display advert can be tracked for success.

11.5 Types of display adverts

There are many different ways to display adverts online. Here are some of the most common options.

11.5.1 Banner adverts

A banner advert is a graphic image or animation displayed on a website for advertising purposes. Static banners are in GIF or JPEG format, but banners can also employ rich media such as Flash, video, JavaScript, HTML5 and other interactive technologies; these allow the viewer to interact and transact within the banner. Banners are not limited to the space that they occupy; some banners expand on mouse-over or when clicked.

Standard banner sizes

There are standard sizes (measured in pixels) for static, animated and rich media banner adverts. Creating banners in these sizes means the ads can be placed on many websites (advertisers sell space in these sizes as well). And here, size (both dimensions and file size) does matter – you can expect varying rates of clickthroughs and conversions across the range of sizes. Bigger is usually better, but if you want to know what works best for your brand, test.

Banner sizes available on the Google Display Network include (all sizes are in pixels):

- Banner (468 x 60)
- Mobile leaderboard (300 x 50)
- Leaderboard (728 x 90)
- Small Square (200 x 200)
- Skyscraper (120 x 600)
- Wide Skyscraper (160 x 600)
- Square (250 x 250)
- Medium Rectangle (300 x 250)
- Large Rectangle (336 x 280)

Banners may be animated, static or Flash, but must be under 50k in file size.

Bear in mind that the advertising network often includes a small graphic overlay on the bottom of the advert, and does not resize your advert to accommodate this. To avoid this obscuring your advert, you can leave a few pixels of blank space on the bottom of your advert.

All adverts need to be supplied with a destination URL. Some rich media adverts allow for multiple destination URLs.

11.5.2 Interstitial banners

These are banners shown between pages on a website. As you click from one page to another, you are shown this advert before the next page is displayed. Sometimes the advert can be closed.

NOTE

Google AdWords offers a rich media banner advert builder. You can find it in the 'Ads' tab in the AdWords account interface.

NOTE

Start with the most common banner size.

11.5.3 Popups and pop-unders

As the name suggests, these are adverts that pop up, or under, the web page being viewed. They open in a new, smaller window. You will see a popup straight away, but will probably become aware of a pop-under only after you close your browser window.

These were very prominent in the early days of online advertising, but audience annoyance means that there are now 'popup blockers' built into most good web browsers. This can be problematic as sometimes a website will legitimately use a popup to display information to the user.

11.5.4 Floating adverts

NOTE

This advert appears in a layer over the content, but is not in a separate window. Usually, the user can close this advert. In fact, best practice dictates that a prominent close button should be included on the advert, usually in the top right hand corner. Floating adverts are created with DHTML or Flash, and float in a layer above a site's content for a few seconds. Often, the animation ends by disappearing into a banner advert on the page.

Remember: your goal is to inform and motivate customers, not annoy them.



Figure 4. An expanded banner ad, including video, on the Los Angeles Times website.

11.5.5 Wallpaper adverts

This advert changes the background of the web page being viewed. It is sometimes possible to click on an advert of this type, but not always. The effect of these adverts is difficult to measure as there is often no clickthrough, and its chief purpose is branding.

11.5.6 Map adverts

This is advertising placed on an online map, such as Google Maps. This type of advert is ideal for local businesses and is usually based on keyword searches for the brand's offering.

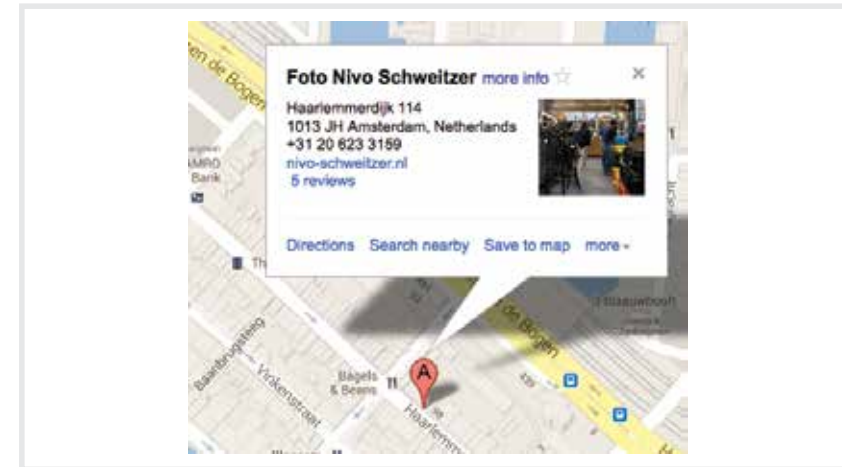


Figure 5. A map advert on Google Maps.

11.6 Payment models for display advertising

As well as a variety of mediums and formats, there are also a number of different payment models for display advertising.

11.6.1 CPM

CPM stands for cost per thousand impressions (M is the Roman numeral for a thousand). This means the advertiser pays for every thousand times the advert loads on the publisher's page. This is how a campaign is normally priced when brand awareness or exposure is the primary goal.

CPM rates for rich media adverts are usually higher than for standard media adverts. This is often based on file size.

11.6.2 CPC

CPC stands for cost per click. This means that the advertiser pays only when their advert is clicked on by an interested party, regardless of how many times it has been viewed. CPC advertising is normally associated with search advertising,

NOTE

although it has become very popular in display advertising too, especially when using ad networks. Banners can be priced this way when the aim is to drive traffic and conversions. It is also a payment method sometimes used in affiliate marketing, when the aim is to drive traffic to a new website.

11.6.3 CPA

CPA refers to cost per acquisition. This model means that the advertiser pays only when an advert delivers an acquisition after the user clicks on the advert. Definitions of acquisitions vary depending on the site and campaign. It may be a user filling in a form, downloading a file or buying a product.

CPA is often the best option for advertisers because they pay only when the advertising has met its goal. For this reason, it is also the worst type for the publisher, as they are rewarded only if the advertising is successful. The publisher has to rely on the conversion rate of the advertiser's website, something that the publisher cannot control. The CPA model is not commonly used for banner advertising and is generally associated with affiliate marketing.

NOTE

Read more about this in the *Affiliate Marketing* chapter.

11.6.4 Flat rate or sponsorships

Sometimes, owners of lower-traffic sites choose to sell banner space at a flat rate – in other words, at a fixed cost per month, regardless of the amount of traffic or impressions. This would appeal to a media buyer who may be testing an online campaign that targets niche markets.

There are several variations to what a sponsorship on a website entails. Examples include exclusive adverts on all the pages and slots on a specific page, newsletter or section, and sponsoring content. Sponsorship means that no other advertiser will appear in that section. Sponsorships are often difficult to measure and are mostly used to raise brand awareness. These can be very effective when launching a new brand.

11.6.5 CPE

With the cost per engagement (CPE) model, advertisers pay for interactions with adverts, normally placed in videos or applications (such as Facebook applications). An interaction, referred to as an engagement, usually starts with a rollover (or mouse-over) that expands the ad. Once expanded, an advert may contain a video, game, form, or other interactive content. The ad doesn't take the user away from the web page, and marketers pay only when an individual completes an action.

11.6.6 What payment model can you expect?

The advertiser rarely has a say over the payment model used – this comes down to the website owner or publisher, advertising type and other factors, such as the popularity of the site.

CPM favours the publisher, while CPA favours the advertiser. Sometimes, a hybrid of the two payment models is pursued.

High-traffic, broad-audience websites (often referred to as 'premium' or booked media) will typically offer CPM advertising. Examples include web portals such as www.yahoo.com or news sites such as www.cnn.com.

Niche websites with a targeted audience are more likely to offer CPC or CPA advertising to advertisers with an appropriate product. These can also fall under the umbrella of affiliate marketing.

Types of advertising can be seen on a scale from more intrusive (and thus potentially annoying to the consumer) to less intrusive. In the same way, payment models can be scaled from those that favour the publisher to those that favour the advertiser.

When planning a campaign, it is important to know how the advertising will be paid for and what kinds of advertising are offered by publishers. A lot of this can be solved by using a company that specialises in advert serving, media planning and media buying.

11.7 Getting your ads online

To get your ads to appear online, you need to find and pay for the space where it will appear. There are several options for doing this:

- Premium booked media
- Advertising networks
- Advertising exchanges
- Social media advertising placements
- Mobile advertising
- Ad servers

11.7.1 Premium booked media

Premium booked media works very much in the traditional way of booking advertising – the advertiser contacts the premium media provider (usually a single group that oversees a key, high-profile online space) and discusses options for placing an advert. This will involve negotiating on targeting and pricing for the space desired, and is usually a costly but high-profile option.

NOTE

Read more about this in the *Affiliate Marketing* chapter.

NOTE

Which is the best payment model for you? This will depend on the purpose of your ads and the return you expect on your investment. Each payment model can be effective and lucrative if used appropriately.

11.7.2 Advertising networks

An advertising network is a group of websites on which adverts can be purchased through a single sales entity. It could be a collection of sites owned by the same publisher (for example, New Line Cinema, Time Inc. and HBO are all owned by Time Warner Inc.) or it could be an affiliation of sites that share a representative. The Google Display Network is one of the largest advertising networks in the world.



Figure 6. Ad formats available on the Google Display Network.

The advertising network acts as an intermediary between advertisers and publishers, and provides a technology solution to both. As well as providing a centralised ad server that can serve adverts to a number of websites, the networks offer tracking and reporting, as well as targeting.

Advertising networks usually categorise the sites by factors such as demographics, topic, or area of interest. Advertisers pay to advertise in specific channels, and not in individual sites. Most times, the campaign will then be optimised based on the best converting sites.

Rates are often negotiated with the network, and placements are booked over a period of time.

11.7.3 Advertising exchanges

Advertising exchanges, on the other hand, are where unsold advertising space – called inventory – is placed by publishers for bidding. The inventory is sold to the highest bidding advertiser. Giving advertisers far more control, this type of advertising mimics the PPC model of search advertising (Generalised Second Price auction) – but bids are for audience profiles and space rather than for keywords. It allows publishers to fill unsold inventory at the highest available price, and can give smaller advertisers access to this inventory.

11.7.4 Social media advertising

Many social media platforms offer an advertising option, as this is their primary source of revenue. Social media can be an excellent place to reach prospects because you can usually target very accurately based on user-provided demographic information.

Facebook

Facebook offers four paid-for advertising solutions:

1. **Facebook Ads** are standard adverts that appear in the user's right-hand sidebar. They have no minimum spend and can be bought on either a cost per thousand impressions (CPM) or cost per click (CPC) basis. These adverts are served based on interests and demographic information. For example, an advertiser can request to have their advert shown to all women in London who are interested in men, who are single and between the ages of 25 and 35, and who like dogs or puppies.



Figure 7. Targeting options on Facebook.

2. **Facebook Engagement Ads** are similar to standard ads, but include an element that fans can engage with, such as a Like or Share button, a video, an event, or a poll. These are bought on a CPM basis with a minimum spend threshold.
3. **Sponsored stories** are posts that are created whenever someone engages with a specific element of the brand's Facebook Page; these then appear in their connections' news feeds. You allocate a budget to the specific post, and this is spent to have the ad appear.
4. **Promoted posts** allow you to publicise an existing post that you have made. A page must have at least 400 Likes before this option becomes available.

NOTE

Facebook will show you the size of the audience you have targeted and how much each click is likely to cost.

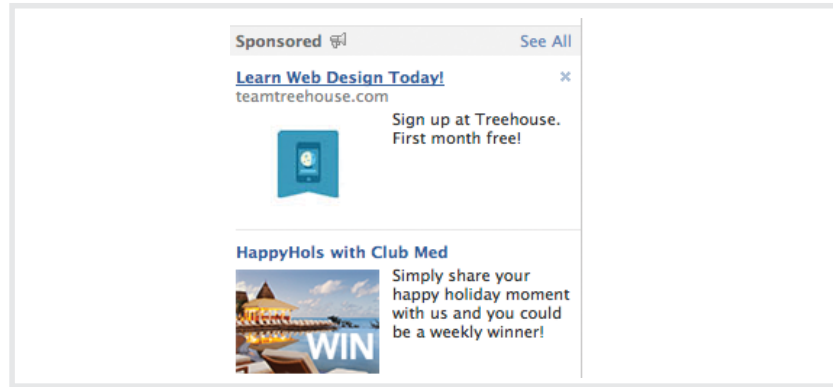


Figure 8. Ads on Facebook.

NOTE

Facebook Advertising information can be found at www.facebook.com/advertising.

Twitter

Twitter offers a self-service ad platform with several options and allows a degree of specific targeting. The service is still relatively new, which means that it changes frequently, and not all options may be available to all regions or user accounts.

- **Promoted tweets** are tweets that appear at the very top of a user's timeline, or in Twitter mobile apps. There is no minimum spend, and advertisers pay when users retweet, @reply to, favourite or click on a promoted tweet.
- **Promoted accounts** are user accounts that appear on the left of the user's Twitter timeline, in the section called "Who to follow", which recommends accounts the user may like. Advertisers pay when a user follows the promoted account.

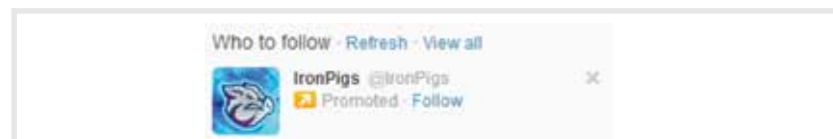


Figure 9. A Promoted account on Twitter.

NOTE

More information on Twitter advertising can be found at business.twitter.com/advertise/start.

- **Promoted trends** is available only to full-service Twitter Ads customers and allows a brand to list their brand name, hashtag or slogan in the left-hand "Trends" section of a user's Twitter timeline, which is usually reserved for the most popular topics of the moment on Twitter. These generally have a flat fee and can cost hundreds of thousands of dollars, depending on how wide the geographic targeting is.

YouTube

YouTube offers a wide range of advertising formats and options for businesses. These are covered in detail in the chapter on video marketing.

LinkedIn

LinkedIn Ads is a self-service advertising platform that allows you to create and place adverts on prominent pages on the LinkedIn website, including a user's home page, search results pages, groups and more. There are many targeting options available, including job title, job function, industry, geography, age, gender, company name, company size, and LinkedIn Group. There is a minimum budget requirement of \$10 a day (though no minimum spend), and ads can be served on a CPM or CPC basis.

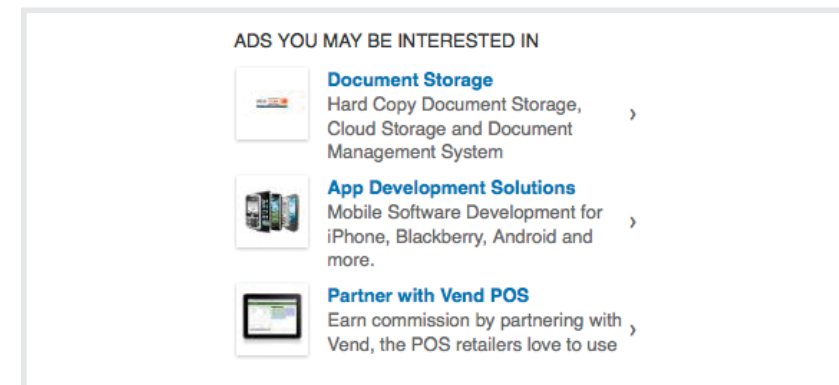


Figure 10. LinkedIn ads.

11.7.5 Mobile advertising

There are three types of mobile networks that you can choose from when embarking on a mobile advertising campaign.

Blind networks

These networks target a large number of independent mobile publishers, and generally allow you to target by country or type of content, but not by specific websites. Payment tends to be on a CPC basis, which can vary. An example of this kind of network is BuzzCity (www.buzzcity.com).

NOTE

You can find out more at www.youtube.com/yt/advertise.

NOTE

Read more about this in the *Video Marketing* chapter.

NOTE

More information about LinkedIn advertising can be found at www.linkedin.com/advertising.

Premium blind networks

Advertising on premium blind networks tends to be more expensive, but allow the advertiser to target better-known brands and high-traffic sites. Broadcasters or operator portals fall under this category. Payment here is often on a CPM basis. Millennial Media (www.millennialmedia.com) is an example premium blind network. While targeting options are available, different networks can work in different ways, with varying levels of support.

Premium networks

These networks often offer sales as a direct extension of the big brands that they offer. More detailed targeting and sales support is available, but they also charge higher rates. An example of this kind of network is Widespace (www.widespace.com/en).



Figure 11. Widespace is an example of a premium mobile ad network.

11.7.6 Ad servers

Ad servers are servers that store advertisements and serve them to web pages. Ad servers can be local, run by a publisher to serve adverts to websites on the publisher's domain, or they can be third-party ad servers, which serve adverts to web pages on any domain. Ad servers facilitate advert trafficking and provide reports on advert performance. They have two functions: to help publishers manage their ad inventory, and to help advertisers monitor and optimise their campaigns.

The benefits of ad servers

Rather than distribute copies of each piece of creative advertising to each publisher or media buyer, you can send out a line of code that calls up an advertisement directly from the ad server each time an advert is scheduled to run. The agency loads the creative to the server once and can modify rotations or add new units on the fly without needing to re-contact the vendors. This is referred to as third-party ad serving.

The ad servers provide a wealth of data, including impressions served, adverts clicked, CTR and CPC. While publishers have their own ad servers, most of the third-party ad servers also have the ability to provide performance against post-click activities such as sales, leads, downloads, or any other site-based action the advertiser may want to measure.

Ad servers provide a consistent counting methodology across the entire campaign enabling the advertiser to gain an 'apples to apples' comparison of performance across the entire media schedule, which includes multiple websites. This ensures that the advertiser gets what they are paying for, and avoids fraudulent activities, such as click fraud, as a good third-party ad server should be audited.

The ad server also allows sophisticated targeting of display advertising. Examples of third-party ad servers include Google DoubleClick, Atlas and MediaMind.

11.8 Targeting and optimising

Ad servers serve adverts across a number of websites, and can track a user visiting websites using cookies or IP addresses. This means that ad servers can offer advertisers:

- **Frequency capping:** this limits the number of times a specific user sees the same advert in a set time period.
- **Sequencing:** this ensures that a user sees adverts in a particular order.
- **Exclusivity:** this ensures that adverts from direct competitors are not shown on the same page.
- **Roadblocks:** this allows an advertiser to own 100% of the advertising inventory on a page.

NOTE

The Mobile Marketing Association publishes a set of useful guidelines for mobile advertising. Download the latest version at time of publishing here: www.mmaglobal.com/files/mobileadvertising.pdf.

The ad server can also target adverts based on the business rules of the advertiser or the profiles of the users:

NOTE

Location targeting can be very cost-effective for physical events and regional offers.

- **Geo-targeting:** online advertising has the ability to target markets by country, province or city, and can even drill them down to something as specific as their IP address. This is also known as IP targeting.
- **Network or browser type:** markets can further be targeted via networks or browser types such as Mozilla Firefox, Internet Explorer, Chrome and Safari.
- **Connection type:** users can be segmented and targeted according to their Internet connection type, for example, whether they use broadband or dial-up connections.
- **Day and time:** advertisers can choose the time of day or day of the week when their adverts are shown. Advertisers can specify when their campaign should flight, down to the minute. This usually depends on the client's objective for the campaign or the product itself.
- **Social serving:** websites gather demographic data about users and then serve each user targeted and relevant advertising. For example, Facebook will allow advertisers to select specific characteristics of users who will be shown an advert.
- **Behavioural targeting:** the ad server uses the profile of a user (built up over websites visited previously) to determine which adverts to show during a given visit. Ad servers can base this profile on cookies or on IP addresses. For example, the ad server may choose to show adverts for pet insurance on a news page to a user who has visited the pets and animals section of a general media site previously.

Re-marketing is another form of behavioural targeting. This allows the ad server to display ads to users after they have interacted with a website in a certain way – for example, by adding an item to their cart on an eCommerce page but not checking out. The user may then see an ad for the product they have in their cart, to encourage them to go back and make a purchase.

Another approach to behavioural targeting is to set up parameters to determine when a certain advert needs to be shown. For example: if the user has clicked on a banner advertising a test drive, and the user has actually booked the test drive, the next time they see an advert from the advertiser, a different advert will be shown because the user has already responded to the first one.

- **Contextual advertising:** the ad server deduces the optimum adverts to serve based on the content of the page. For example, on an article about mountain bike holidays in Europe, the ad server would show adverts for new mountain bikes, or adverts from travel companies offering flights to Europe, or perhaps adverts for adventure travel insurance.

11.9 Tracking

The trackability of online advertising is what makes it so superior to conventional advertising. Not only can an advertiser tell how many times an advert has been seen (impressions), but also how many times the advert has been successful in sending visitors to the advertised website (clicks). As discussed in the chapter on conversion optimisation, the tracking needs to continue on the website to determine how successful the advert has been in creating more revenue for the website (conversions).

As well as tracking adverts, advertising networks can also provide information about the people who saw the advert, as well as those who acted on it, including:

- Connection type
- Browser
- Operating system
- Time of day
- Internet service provider

Many third-party ad servers will set a cookie on impression of an advert, not only on clickthrough, so it is possible to track conversions that happen indirectly (called view-through conversions). Simply put, third-party ad servers can track not only the post click data, but also the post view data: when a user sees an advert, does not click on it, but goes to the website after viewing the advert (either by typing in the URL, or by searching for the site).

Using this information, the ad server can target the adverts displayed, helping advertisers to optimise campaigns and get the most from their budgets.

11.10 Step-by-step guide to online advertising

Knowing the various types of display options and payment models available is all very well, but you may be wondering how to put this all together as you plan your campaign. Here is a step-by-step guide that you can follow to ensure that you run effective adverts.

NOTE

Read more about this in the *Conversion Optimisation* chapter.

NOTE

Don't forget to keep an eye on any non-digital advertising that the brand is doing – this could have a significant effect on your results, and you want to ensure that you are communicating the same message.

1. Determine the goal of your campaign.

Are you embarking on a branding campaign, or is your primary focus direct response?

2. Identify your key performance indicators (KPIs).

Which figures will let you know if you are succeeding? This should tie in closely to your goal.

3. Investigate your target audience.

What websites are they likely to be visiting? The type of creative you use and the payment model you follow will largely be determined by the websites that you advertise on.

Online advertising is an acquisition and awareness channel. It does not require users to seek an interaction actively, as search advertising and email marketing do. So, it is crucial that the adverts are placed in front of the audience that is most likely to convert.

4. Research potential websites to host your adverts.

Niche websites with a smaller, more targeted audience will most likely charge a flat rate for display advertising, or a CPA rate. They could be flexible in display options that they give you, but you will need to take into account their bandwidth costs if they serve the adverts.

High-traffic websites with a broad audience will usually charge on a CPM basis. They will broker their advertising inventory through an advertising network, or even a number of advertising networks.

5. Set a budget.

Most advertising platforms will let you set and dynamically manage your budget. Decide how much you are willing to pay per click, impression, action or engagement, and set your total budget in line with this.

6. Create your adverts.

Now, you will need to brief your creative team to ensure that you have the optimum banners for your campaign.

Your online adverts will need to:

- Attract attention
- Convey a message
- Entice action

Animation attracts attention, but be wary of being one of several animated banners on a website. Banners should not be considered in isolation, but rather in the context of the website on which they will appear.

Web users respond well to being told what to do, and the content of an online advert should be concise and directional. Examples of these CTAs include:

- "Phone now for the best deals on insurance."
- "Click here for fast home delivery."
- "Donate now."

7. Choose or create a landing page.

All advertising needs an appropriate landing page or destination URL. Whether this involves creating a microsite, or merely leading users to an existing page on the website, ensure that clickthroughs are not being wasted. Generally, sending advertising traffic to your home page is not a good idea as it leaves the user confused about where to go next.

8. Run your adverts.

Now that you're all set up, you can let your ads go live! Keep a close eye on your spending to ensure that you're getting a decent return for your money, and that nothing unusual is occurring.

9. Track, measure, optimise.

As with all online marketing tactics, you need to track what your ads are doing and the results they are generating, measure your returns and successes, and then optimise your online advertising campaigns to get even better returns in future.

NOTE

If a problem comes up, you can simply stop your campaign, change the creative elements or modify your approach - the beauty of online advertising is that it can be revised almost instantly.

11.11 The future of online advertising

On the web, the convergence of digital devices and channels is leading to new avenues for online advertising. Digital advertising can reach customers anywhere where they can access the web.

While we have become used to the Internet as a free medium where we can read and interact with any content we want, it is the fact that it is an advertiser's medium that keeps it free. And that means that as technologies evolve and the way we interact with content changes, so advertising follows.

Previously the level of interaction a web user had with a website could be measured by the number of pages of that website the user viewed. Now, technology such as AJAX and rich media such as video mean that the time spent on a web page can be more meaningful than the number of pages viewed. The key word here is 'engagement', and technology and data analysis is working towards being able to determine how websites can quantify the level of engagement with a viewer.

A little online research will reveal plenty of commentary declaring the decline of display advertising. Increasingly, consumers are becoming both weary and wary of advertising. Clickthrough rates on banners are dropping, so the effectiveness of display advertising is being questioned by some. With the focus in digital marketing on tracking and measuring response and engagement, should a company spend money on less measurable activities such as 'brand building', where they are paying on a CPM basis?

NOTE

Using third-party ad servers and post-impression tracking, the effect of different advertising and marketing channels on each other can be observed. Banner advertising can see an increase in search volume, for example.

What does this tell us? Measurement should take place across all channels, and no channel should be utilised in isolation. The best results will be gained through an integrated and holistic approach to digital marketing.

11.12 Advantages and challenges

11.12.1 Advantages of online advertising

Banner advertising goes a long way towards bridging the advertising divide. Adverts have a set size, they can look very similar to print adverts, and they occupy a particular bit of real estate in a publication with a particular number of views. It's easy to understand, and it does the things with which buyers are familiar.

Online advertising can take advantage of the emotive qualities of images, videos and animations. Some campaigns are better suited to images rather than plain text.

Since banners can contain rich media, they offer levels of interactivity that other forms of advertising cannot achieve. This allows your target market not only to see your banner, but also to play with it. Interaction builds a bond and improves the chances of the consumer remembering your brand tomorrow. Cognitive learning is a powerful outcome of interactive display advertising.

Modern online advertising is able to bring together a number of other online marketing tactics such as animations, games, video and Flash.

View-through conversions are important to look at as well, especially if your campaign is focused around raising awareness.

Banner ads, like all digital marketing tactics, are measurable. Track clickthrough rates and you get an idea of exactly how many people are responding to your Call to Action. Some publishers even have the ability to do post-click tracking, which means that you can track the user all the way to a sale if that is the purpose of the advert.

11.12.2 Challenges of online advertising

A lot of display advertising is intrusive, so popup blockers can often prevent adverts from being served as they were intended by the advertisers. There are also extensions available for web browsers, such as Adblock Plus, that will block advertising on web pages. Technologically savvy consumers are increasingly using these methods to limit the advertising that they see.

Bandwidth can also be an issue, although this is a shrinking problem. However, campaigns should be planned according to demographics in determining the richness (and investment) of interaction.

Consumers are suffering from advertising fatigue, so while new technologies can provide great results, as soon as the market moves mainstream it can get saturated. Consumers are increasingly ignoring adverts.

NOTE

Advertising blindness is not a problem that's unique to the web - for example, TV viewers are increasingly fast-forwarding through ads or watching episodes through online streaming services.

11.13 Case study – Toyota Prius

11.13.1 One-line summary

Toyota launches a display advertising campaign to draw awareness to the new Prius and increase sales.

11.13.2 The problem

The Prius is a hybrid electric car. Toyota needed to raise awareness and drive sales around the introduction of new models to the Prius line. To address this challenge, they brought the Saatchi & Saatchi LA team on board (WorldsBestCaseStudies.com, 2012).

11.13.3 The solution

Since the idea for the second Prius had been conceived, debate had surrounded the question of what exactly the term for the plural of Prius would be (Walsh, 2013). The Saatchi team identified this as a potential talking point among customers and launched the 'Prius goes plural' campaign.

The promotional video posted on YouTube asked fans what they thought the plural of the name 'Prius' should be. The video then gave social media users a month to vote for the best term.

In order to drive awareness and interest in the campaign, they created a series of animated, interactive display ads.

Some of the display ads featured animated Prius vehicles that sped into life by driving across the page into the text that the viewer was reading.



Figure 12. An animated Prius ad. (Source: WorldsBestCaseStudies.com, 2012)

11.13.4 Results

The display advertising campaign was incredibly successful in driving awareness, interaction and traffic to a range of portals. It achieved this by incorporating a fun concept with some eye-catching display adverts that also encouraged interactivity – a perfect blend that speaks to display advertising best practice.

Here are some figures that demonstrate the success of this display advertising strategy:

- The YouTube video alone was viewed over 250 000 times, with almost 300 comments (ToyotaUSA, 2011).
- The Facebook Page received over 400 000 likes with 1 141 likes for a single post, although comments on posts were lacking (Toyota Prius, 2000).
- The hashtag #PriusGoesPlural trended on Twitter.
- The campaign received just 1.2 million votes – and the Prius plural was announced as Prii (Walsh, 2013).
- This campaign also drove sales with a record of over 1 million Prius sales, even in a tough economy (WorldsBestCaseStudies.com, 2012).

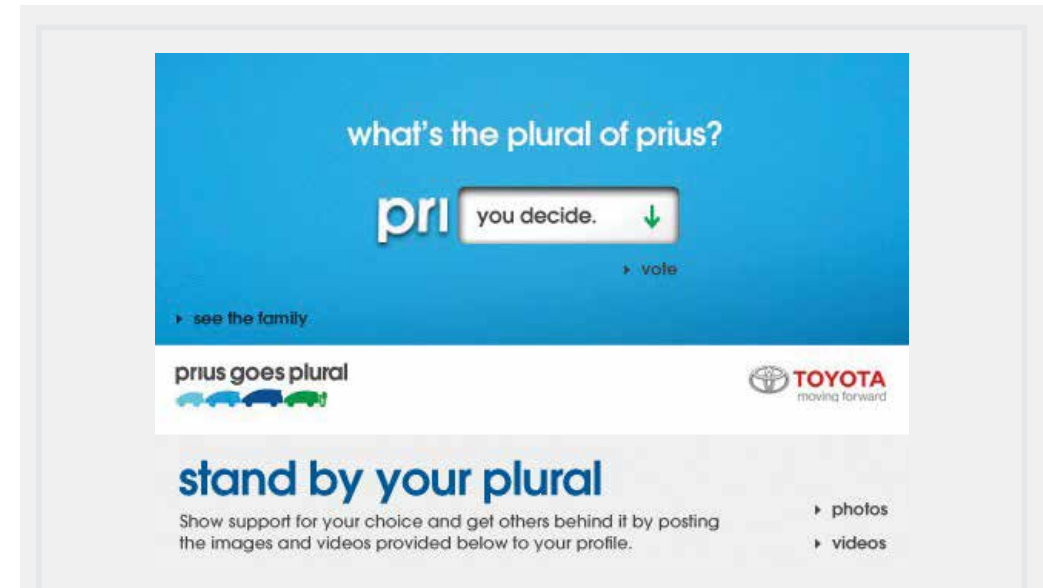


Figure 13. An interactive ad that allowed users to enter their suggestions.

11.14 The bigger picture

Offline advertising and marketing campaigns can be adapted for an online audience in order to ensure maximum brand exposure. It is very effective in enhancing offline marketing and advertising activity and in ensuring a wider reach.

As mentioned, online advertising can be used as an acquisition channel, reaching out to a new audience. It can be used to initiate a buying cycle and customer relationship, which then plays out across other online channels. Addressing advertising and other channels to complement each other will result in a consistent message, and optimum results. Online advertising can be used to reach a large audience, and then other digital marketing tactics can be used to refine and engage this audience further. Social media advertising in particular is crucial for building communities and keeping the brand top of mind.

Online advertising and affiliate marketing go hand in hand. Affiliate networks also act as advertising networks, allowing for advertising to be purchased on a performance basis.

When seeding new products and viral campaigns, display advertising can be used to reach a wide audience at a low cost. It can expose a campaign to many new users, and increase the chance that those who are most likely to pass on a message receive it in the first place. Display advertising also supports other advertising and marketing channels, such as search advertising and marketing.

11.15 Summary

Online advertising has two main objectives:

- Branding
- Direct response and sales

The Internet allows for highly targeted and highly trackable advertising across a variety of online media. Some ways that advertisers can use the Internet are:

- Banner adverts
- Interstitial banners
- Popups and pop-unders
- Floating adverts
- Wallpaper adverts
- Map adverts

Ad servers provide trafficking, tracking and reporting solutions to both advertisers and publishers. They allow advertisers to target display adverts based on parameters, including:

- User profile (location, operating system, browser, connection type)
- Behaviour
- Frequency and sequencing
- Exclusivity
- Context of content

Technology allows for increased levels of interaction within an advert, and for advertising tailored to engagement media such as online videos and social network applications.

11.16 Case study questions

1. Why did display advertising play such a critical role in the Prius campaign?
2. Why did people find the concept of coming up with a plural for Prius so engaging?
3. What is the benefit of using interactive adverts, as demonstrated in the case study?

11.17 Chapter questions

1. Online banner advertising and outdoor display advertising both use images to try to increase sales. In planning, both need to consider placement so as to be seen by their most likely audience. What are the key differences?
2. Why is display advertising an effective acquisition channel?
3. Go to www.wheels24.co.za and www.thetimes.co.za. What advertising can you find on the front page of these two websites? What products are being advertised, and how are they being advertised? What can you deduce about the target market for these products?

11.18 Further reading

www.adrants.com – Commentary on online advertising campaigns. US focused.

econsultancy.com/uk/blog – UK industry-focused advertising articles.

www.bannerblog.com.au – Have a look at Bannerblog for rich media examples.

11.19 References

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12

Affiliate Marketing

What's inside: We look at **how affiliate marketing works**, discovering different **actions and rewards** and how **tracking** works (as well as the cookies involved). We uncover some of the ways in which **affiliates promote merchants**, and how **affiliate networks** fit into the scheme of things; and look at some handy **tools of the trade** for affiliate marketing. There is an introduction to **setting up an affiliate campaign**, **pros and cons** of affiliate marketing and, of course, a **summary** of the chapter, and a look at **how it all fits together**.

12.1 Introduction

If you recommend a restaurant to a friend, and that friend visits the restaurant because of your recommendation, the restaurant's revenue will have increased because of your referral. This is 'word of mouth' marketing. But you, as the referrer, do not see any of the cash benefit that the restaurant does.

Imagine that the restaurant gave you 10% of the bill for every person you referred. They would be paying you a finder's fee for new customers. There are a number of businesses that market in this way offline. Brokers for insurance products are an example, but these referrals can be hard to track. Online, they are very easy to track. This system of reward, where compensation is based on referral, is called affiliate marketing, and this term is used to describe this type of marketing in an online environment.

Affiliate marketing occurs where a third-party advertises products or services on behalf of a merchant in return for an agreed commission for a sale or lead. Because of this, affiliates are sometimes viewed as an extended sales force for a website.

In this chapter, you will learn:

- Which crucial elements go into a successful affiliate programme.
- How to set up and run your own affiliate marketing programme.
- Which tools and resources you will need to sell products through affiliates.

12.2 Key terms and concepts

Term	Definition
Action	A specified task performed by a user, which results in the affiliate being awarded commission. Actions include purchasing a product, signing up for a newsletter or filling in a form.
Affiliate	The person who markets the products of the merchant. Also called a publisher.
Clickthrough	A click on a link that leads to another website.
Commission	The bounty paid by a merchant to an affiliate when the affiliate makes a successful referral.

Cookie	A text file sent by a server to a web browser and then sent back unchanged by the browser each time it accesses that server. Cookies are used for authenticating, tracking, and maintaining specific information about users, such as site preferences or the contents of their electronic shopping carts.
Conversion rate	The number of conversions divided by the number of visitors, expressed as a percentage.
Cost per Action (CPA)	The amount paid when a certain action is performed by a user.
Cost per Click (CPC)	The amount paid when a link is clicked on.
Cost per Lead (CPL)	Commission structure where the affiliate earns a fixed fee for a lead sent to a merchant.
Merchant	The owner of the product that is being marketed or promoted.
Referrer	When a user clicks on a link from one site to another, the site the user has left is the referrer. Most browsers log the referrer's URL in referrer strings. This information is vital in determining which queries are being used to find specific sites.
Revenue share	Commission structure where the affiliate earns a percentage of a sale.
Return on investment (ROI)	The ratio of profit to cost.
Session	The period that a user with a unique cookie spends on a website during a specified amount of time.
Traffic	The browsers that visit a website.
Universal Resource Locator (URL)	A web address that is unique to every page on the Internet.
eXtensible Markup Language (XML)	A standard used for creating structured documents.

12.3 The building blocks of affiliate marketing

The core of affiliate marketing is a simple process:

1. An affiliate refers potential customers to a merchant's website or other offsite destination (such as a Facebook tab).
2. Some of those customers perform a desired action.
3. The merchant rewards the affiliate for each desired action that results from the affiliate's referral.

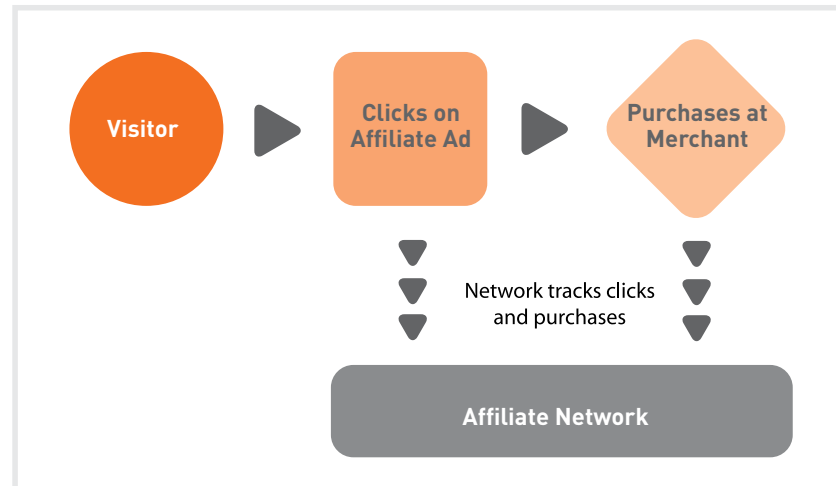


Figure 1. The affiliate marketing process.

However, there are many different ways in which an affiliate might market a merchant's offering; there are many different actions that can be rewarded; and, most importantly, there needs to be some way to keep track of the whole process.

12.3.1 Action and reward

NOTE

Affiliate marketing is most commonly used for eCommerce websites, but it doesn't have to be limited to this. If other actions on your site are valuable, it may be worth considering engaging an affiliate.

Affiliate marketing can be used to promote any type of website – there just needs to be an agreed-upon action resulting in an affiliate earning commission. Different types of merchants will have different required actions. The actions and the type of commission can be summed up as:

- **Cost per Action (CPA)** – a fixed commission for a particular action.
- **Cost per Lead (CPL)** – a fixed commission for a lead (that is, a potential sale).
- **Revenue share (also CPS or Cost per Sale)** – an agreed-on percentage of the purchase amount.
- **Cost per Click (CPC)** – a fixed amount for each clickthrough to the website (although this forms a very small part of the affiliate marketing mix).

Let's look at an example of each of the first three actions above:

CPA

Here, the action could be anything from downloading a white paper or software to signing up to a newsletter.

CPL

Merchants who offer CPL commissions are usually those who need to convert a lead into a sale offline. This means they will generally need to complete the transaction over the phone with the customer, or that the process is quite complicated. Typically, insurance companies and banking institutions offer this type of commission. Membership sites that offer a free trial period, such as online DVD rental, can also use this commission structure.

You may be wondering why merchants are willing to pay for a lead, instead of only for completed transactions.

Affiliates prefer this model, as they are not in control of the offline conversion process. It is the merchant's job to be able to complete the transaction. Some merchants may be wary that the leads will not be of a high enough quality. This is why they will usually have conversion targets with which the leads generated need to comply as a quality control.

Revenue share

Revenue sharing is the ideal commission structure as both the merchant and the affiliate are rewarded for performance – the more sales, the more revenue generated for the merchant, and the more commission for the affiliate. Websites where a sale can be performed instantly are ideal for revenue sharing. Online retailers and instant online travel agents are perfect examples of merchants who offer a revenue share commission. The affiliate earns a percentage of the sale.

Merchants tend to structure their commission offering so that affiliates who perform better earn a higher commission.

For example, a merchant may offer the following tiers of commission:

- 1–10 sales: 10% commission
- 11–25 sales: 11% commission
- 26–50 sales: 12% commission
- 51 or more sales: 15% commission

We have seen that there are different types of actions that can result in commission being awarded, and that these usually suit the website that is being promoted. This means that any industry that is online can most likely be promoted through affiliate marketing.

Affiliates have many options open to them to promote merchants' websites. But before we get to that, we need to take a look at tracking – the thread that holds it all together.

12.3.2 Tracking

The key to affiliate marketing is being able to track the whole process from potential customers being sent to a website through to a completed action, so that the merchant is able to award the correct affiliate with the correct commission.

Specialised affiliate tracking software is used to track affiliate campaigns, and this is usually supplied and supported by an affiliate network. Often, the merchant and the affiliate will also use their own tracking software to make sure that there are no major discrepancies.

Affiliates send traffic to merchants through links or URLs, and the tracking software allows each affiliate to have a unique identifier in the URL. These links set a cookie on the customer's computer, which allows the software to track the sale.

For example, here is the URL of a product on a retailer's website:

<http://www.firebox.com/product/1201>

Here is the URL for the same product, but with affiliate tracking:

http://scripts.affiliatefuture.com/AFClick.asp?affiliateID=238&merchantID=214&programmeID=3897&mediaID=0&tracking=cube_world&url=http://www.firebox.com/index.html?dir=firebox&action=product&pid=1201&usg=AFQjCNGdHpzAasCefzDnyUBPxagxqvTA

You can see some of the information being recorded. It has been shown in bold in the URL:

- **The affiliate network – Affiliate Future**
- **The ID of the affiliate (238)**
- **The ID of the merchant (214)**
- **The ID of the programme (3897) (a merchant may have more than one programme on a network)**
- **The media used (0)**
- **The destination of the click**

Can you spot the original URL in the one with the tracking?

When the customer completes the required action on the merchant's website, the cookie will allow the tracking software to collect the information needed to award the commission. For example, if a customer were to use an affiliate link

to purchase a gift from a merchant (using the same URL as before), the following information would be collected:

- **Referring URL and affiliate**
- **Total sale amount for commission**
- **Date and time of sale**
- **Unique order number of sale**

All this information will allow the merchant to confirm that the sale is valid, as well as the amount of commission that is due, without ever releasing any of the customer's personal information.

Affiliate tracking software collects information even if no action is completed. This is vital to the affiliates and to the merchants to see where they can optimise their campaign.

Information collected includes:

- **Impressions**
- **Clicks**
- **Conversions**

All this information helps to build up data in order to strengthen the campaign.

Creative Type	Impressions	Clicks	Conversions	Epc
Banner1	867	42	4	\$ 0.23
Product Feed	1150	203	5	\$ 0.89
Banner2	305	56	2	\$ 0.21

Figure 2. Example of the data collected to measure an affiliate marketing campaign.

Affiliates will use this information to determine the success of their marketing efforts. Remember that affiliates invest money in marketing various merchants, and they are rewarded only on commission. An affiliate will use the above information to determine whether or not to promote a merchant, and how much they should invest in promoting a particular merchant.

Merchants can use the information on their campaign to determine how best to optimise. For example, if a particular type of banner seems to be doing better than others, they could use that to improve other banners that they offer.

How long does a cookie last?

There are a lot of different expiry periods for cookies. Cookies are not just used for affiliate marketing. They are also used to store information so that a website 'remembers' who you are next time you visit it. The domain owner gets to determine how long a cookie should last. This is called the cookie period.

When it comes to affiliate marketing, it is up to the merchant to decide what the cookie period should be. The affiliate is awarded commission only if the desired action takes place within the cookie period. Some merchants make the cookie last for the session only (that is, if the user leaves the website, comes back the same day, and then makes the purchases, no commission is rewarded). The standard cookie period for affiliate marketing is 30 days, although higher-value items with longer purchase considerations, such as package holidays abroad, can last as long as 90 days.

There are merchants who offer what is called an affiliate lock-in. Here, the first affiliate to refer the customer earns commission for the lifetime of the customer: every purchase that the customer makes will earn the affiliate commission.

NOTE

What is the fairest option? This will depend largely on the type of action or product in question.

Affiliates tend to prefer a longer cookie period; it increases the likelihood of being awarded commission.

Tracking issues

Successful tracking is fundamental to any digital marketing campaign, and especially so to affiliate marketing. As affiliates are paid only for performance, if anything goes wrong in the tracking process, it is the affiliates who suffer. The merchant will still get the desired sales, but the affiliates won't be rewarded.

It is therefore good to bear in mind some of the problems that can be faced with tracking.

Multiple referrals, one sale – who gets the bounty?

With so many affiliates, it is not uncommon for a potential customer to visit a merchant's website through the links of many different affiliates before finally making a purchase. Who do you think should receive the commission?

For example: A user sees a banner on a website he visits promoting a weekend in Paris, booked with Eurostar. The user clicks on that banner and checks out the deals on the Eurostar website. A cookie is set, as the first website is an affiliate of Eurostar.

He doesn't book right away, but after chatting to his girlfriend, they decide to book the trip. He goes to Google, searches for 'Eurostar weekend in Paris', and clicks on one of the PPC adverts. This has also been placed by an affiliate, but a different one.

This time he books the trip. But which affiliate should be rewarded the commission?

Usually the most recent referral is awarded the commission, although there are some merchants who also offer compensation to other affiliates involved in the sales process. In the example above, the affiliate who placed the PPC advert would get the commission for this sale.

Deleted cookies

Consumers sometimes delete cookies from their computer. If this happens, then the sale will never be attributed to the affiliate. This practice does not seem to have a drastic effect on numbers, however, and so most affiliates will calculate this into their return on investment (ROI).

Clashing cookies

Merchants will often use some kind of tracking so that they can better optimise their own marketing efforts, or a merchant may make some kind of technical change to their website. It is crucial that any of these changes are tested first with the tracking software, to make sure that they do not create any conflict. It is generally accepted practice that even if a merchant's marketing effort is responsible for the final sale, the affiliate still gets the commission if it is within the affiliate's cookie period.

Placing an order by another method

If the customer completes the action, but does not do so online, the affiliate will not receive commission. So, if a customer visits an online retailer through an affiliate link, but places an order over the phone, the affiliate will miss out on commission.

12.3.3 How do affiliates promote merchants?

Affiliates are digital marketers who are paid on a performance basis. Every type of marketing strategy will be found in the affiliate world, and affiliates can often be seen at the forefront of breaking technology and applying it to marketing strategies.

The basic aim of an affiliate is to send targeted traffic (that means customers who are very likely to perform the desired action) to a particular merchant's website. Affiliates may promote as many merchants in as many industries with as many tactics as they want, but they usually specialise.

Most of the tactics will be the same as those that the merchant employs, but will reach a different part of the Internet population. Effective tracking takes care of any overlap, and will help merchants to adjust their spending for the most effective ROI.

The main types of affiliates can be broken up as:

- **Personal websites.** Affiliate marketing came to the fore as a way for personal websites to make money, although this now forms a small part of the affiliate marketing mix.
- **Content and niche sites.** These are websites created specifically around a topic, and any products promoted will carry affiliate tracking. For example, an affiliate may create a site dedicated to digital cameras, with tips and downloads to help you get the most out of your camera. It could review a number of different cameras, and offer links to purchase those cameras online. All of those links will be affiliate links. Seasonality is also a key time for content sites. Websites can be created specifically for Christmas, Mother's Day, and many more key retail seasons.
- **Email lists.** Some affiliates run large opt-in email lists, and they market particular merchant offers through their email newsletters. Some renegade affiliates use spam email to promote merchant offers, but as affiliate marketing has matured, there are usually terms and conditions to prevent this in reputable industries.
- **Loyalty sites** (points, cash back or charitable donations). As affiliates earn a percentage of a sale, some affiliates 'split' this with the customer and create cash back or points-based shopping sites. There are also some that donate a percentage of the commission to a charity.
- **Coupon and promotions sites.** Some affiliates use unique coupons and offers to get users to click on their links; this benefits the affiliate, who earns a commission, and the buyer, who gets a promo or discount.
- **Search advertising.** Some of the most successful affiliate marketers are those who promote various merchants through paid search engine marketing. As these affiliates seek to find the highest earnings for the lowest CPC, this is also referred to as search arbitrage.

NOTE

This is one direct way to monetise your quality content. Some bloggers earn a comfortable living by including affiliate links on their blogs.

Affiliates will find any means possible to promote offers. As new products and platforms become available, marketers and affiliate marketers find new ways to make them work. Some other examples of affiliates promoting merchants include:

- Toolbars and other browser extensions
- Social network applications

All that is required is that the clickthrough to the merchant's website is tracked.

NOTE

Affiliates often come up with innovative marketing approaches for new online platforms pioneering the way for other online marketers. They can be a good source of inspiration for your own efforts.

Mini case study: COUPONS

Coupon-focused affiliate marketing is very common in the digital marketing space. However, this can be perceived as cheap and untrustworthy. COUPONS is one website that offers this form of service.

The website is designed with several coupons on offer. Users can 'clip' the coupon, share it, like it, print it, and even tweet it. This website has been optimised with a strong Call to Action that entices users to take action. The coupons are informative and the calculator in the top right hand corner of the website updates how much the user is saving.



Figure 3. The home page of Coupons.com.

What makes this affiliate marketing programme unique is that the users can print the coupons. This form of affiliate marketing provides users and merchants with both online and offline experience. Therefore, merchants earn returns not only when a coupon is clicked on, but also when they are printed.

This is an example of a website that truly has the user experience in mind, and makes online coupon shopping fun!

12.3.4 Affiliate networks

As well as the affiliate and the merchant, there is generally a very important third party in the affiliate marketing mix – the affiliate network.

While some small affiliate programmes and some very large affiliate programmes (such as Amazon Associates) are run by the merchant, most merchants opt to use an affiliate network to provide most of the technical solutions required for an affiliate programme.

Affiliate networks publish the terms of the affiliate programme, provide tracking solutions, report on programmes, host creative banners, give commission payment options, and support both affiliates and merchants.

When the affiliate logs into a network, they will see the programmes on offer and all the relevant metrics they need in order to decide whether the programme on offer is worth promoting.

Advertiser	1 Month EPC (USD)	7 Day EPC (USD)	Network Earnings	Sale	Lead	Click
Hotels.com	\$131.53	\$493.83	Performance Based	Sale: 7.50% USD		
Hotels.com	\$84.74	\$8.90	Performance Based	Sale: 5.50% USD		
ATLANTIS	\$78.22	\$86.40	Performance Based	Lead: 4.00% USD		
AccorHotels	\$76.97	\$118.38	Performance Based	Sale: 10.00% USD		
AccorHotels.com Asia Pacific	\$59.29	\$13.62	Performance Based	Sale: 3.00% - 6.00% USD Lead: 1.00% - 2.00% USD		

Figure 4. Offer details from various affiliate programs.

In this example, Hotels.com is offering 5.5% of the commission on a sale. The programme pays out \$84.74 per 100 clicks received. The affiliate would need to estimate what 100 clicks will cost them and decide if managing a Hotels.com campaign will be profitable.

The Affiliate Network will also provide information on the programme and the terms and conditions, to incentivise the affiliate to join.

NOTE

The affiliate network will have creative assets, such as images, banners and text, that the affiliate can use.

The affiliate is also able to create their own unique creative assets.

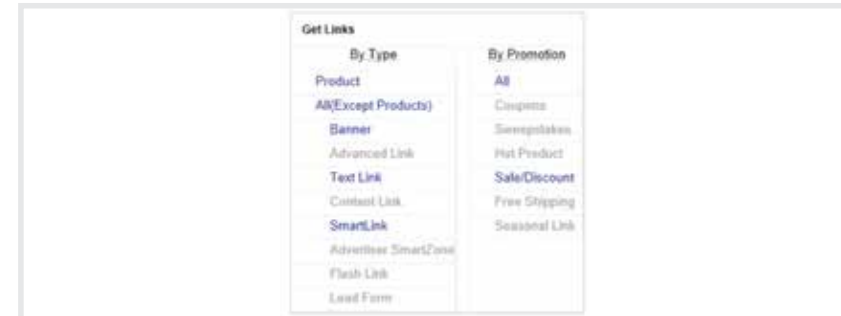


Figure 5. Links to creative assets such as images and text, provided by the affiliate.

For example, by clicking on the banner link, the affiliate can choose which image will best work for them.

Link	Name	Link ID	1 Month EPC (USD)	7 Day EPC (USD)	Sale	Lead	Click	Status	Get Links
Hotels.com	Hotels.com Bk31 Logo	10443216	\$37.28	\$20.06	Sale: 5.50% USD			No Relationship	Get JavaScript Get HTML
Hotels.com	Up to \$100 Rebate	10501870	\$147.27	\$11.87	Sale: 6.50% USD			No Relationship	Get JavaScript Get HTML
Hotels.com	Hotels.com 125x60 Logo	11200482	\$131.38	N/A	Sale: 5.50% USD			No Relationship	Get JavaScript Get HTML
Hotels.com	Hotels.com 125x60 Logo	10433958	\$131.38	\$8.88	Sale: 5.50% USD			No Relationship	Get JavaScript Get HTML
Hotels.com	Hotels.com 150x60 Logo	10501593	\$100.00	\$2.30	Sale: 5.50% USD			No Relationship	Get JavaScript Get HTML

Figure 6. Choosing an image from Hotels.com.

All affiliate programmes will have some restrictions to ensure the affiliate is providing value. Hotels.com has the following policies:

Name	Content
Search Campaigns - Protected SEM Bidding Keywords	travelnow.com, hotels.com, hotel.com, vacationspot.com, hotels.co.uk, condosavers.com, travel.ian.com, orlando.com, expedia.com, hotwire.com, Classic Vacations, Trip Advisor, Egencia, eLong and any and all misspellings thereof. ALL PUBLISHERS RUNNING BROAD MATCH SEARCH CAMPAIGNS MUST ADD "HOTELS.COM" AND VARIATIONS THEREOF AS NEGATIVE KEYWORD MATCH TERMS. You cannot use "hotels.com" as part of the ad copy.
Search Campaigns - Recommended SEM Bidding Keywords	hotels, hotel, hotel rooms, hotel room, hotel stay, vacation, vacations, holiday, travel, holiday travel, concerts, sporting events, vacations, destination specific keywords (Las Vegas, New York, Anaheim, LA, San Francisco, etc)
Search Campaigns - Prohibited SEM Display URL Content	Hotels.com Trademarks are never to be used as the primary display URL for SEM. The following domains and any and all related misspellings cannot be used in any display URL: travelnow.com, hotels.com, hotel.com, vacationspot.com, hotels.co.uk, condosavers.com, orlando.com, expedia.com, hotwire.com
Search Campaigns - Prohibited SEM Ad Copy Content	You must get written permission from Hotels.com in order to include Hotels.com trademarks in your SEM ad copy. Please contact hotels.com@cj.com if you are interested.
Search Campaigns - Direct Linking	No

Figure 7. An example of an affiliate's policy.

Affiliate networks have many affiliates and merchants signed up to them, so they are an ideal source for recruiting affiliates if you are a merchant, or for finding merchants to promote if you are an affiliate. To the merchants, they provide a one-payment solution as the merchant will be invoiced for all the commission collectively owed, which is then dispersed to the affiliates.

NOTE

It's essential for affiliates to choose campaigns that are relevant to the content they create to ensure they are effective, and to maintain their reputations. The Hotels.com campaign would probably perform better on a travel blog than a political news site, for example.

Affiliate networks usually do not charge affiliates to join. They can charge a merchant a setup fee, which will cover the cost of making sure that the tracking solution is successfully integrated, and can charge a monthly management fee, depending on the level of support offered to the merchant. Affiliate networks usually charge the merchant a percentage of the commission earned by the affiliate (called a commission override), so that there are incentives for the networks if they perform well. As a rough guide, this is typically 30% of the commission rewarded to the affiliate.

Some leading affiliate networks are:

- **Commission Junction** – www.cj.com
- **LinkShare** – www.linkshare.com
- **Affiliate Window** – www.affiliatewindow.com
- **TradeDoubler** – www.tradedoubler.com

12.4 Setting up a campaign

Affiliate marketing forms an integral part of digital marketing – how would you go about setting up and launching a new campaign? Affiliate marketing should grow your business, and grow with your business, so it's important to plan and prepare for long-lasting success.

First, you need a clear idea of your business's identity, goals and unique selling points. No doubt you will have competitors that affiliates already promote; you need to be able to give affiliates compelling reasons why your programme is better.

With this in mind, you need to determine the goal of your affiliate marketing. If you are a new business, you may just want to build traffic and brand awareness. Depending on what industry you are in, your goal could be new customer leads, or it could be increased retail sales. Make sure that you are clear on what you want, and that your website reflects this.

Then, you need to decide whether you are going to run your own programme, from affiliate recruitment to tracking and paying, or whether you are going to use

an affiliate network. If you are using an affiliate network, you'll need to do your homework on the best networks to join. Look at:

- **Where your competitors are**
- **Who has the kind of affiliates you want**
- **What the joining fees and monthly fees are**
- **How much support they can offer you**
- **What countries the network is in**

You'll also need to decide whether you will hire an affiliate manager to run your programme, whether you will outsource your programme management, or whether you already have the resources to run the programme yourself.

You need to do a full competitor analysis, focusing on your competitors' affiliate programmes. Look at:

- **Commission tiers**
- **Cookie periods**
- **Creative offerings**
- **Which affiliates they work with**
- **Networks**
- **Incentives offered to affiliates**

Prepare the basics that you'll need to start a programme:

- **Product feed**
- **Banners and other creative offerings**

Using your competitor research, decide on commission, commission tiers, cookie period and incentives.

Test the tracking software on your site, and make sure that it does not conflict with any other tracking you are using.

Now, you should recruit affiliates. Use your competitor analysis to contact potential affiliates, promote your programme through affiliate forums, use your affiliate network contact channels to approach affiliates, and approach sites that you think fit your user demographic.

And it doesn't all stop once you've launched! The key to successful affiliate marketing is ongoing communication with and marketing to your affiliates. You need to make sure you are on top of validating sales, so that they get their commission. You need to ensure that you stay competitive with your commission offering. And you need to keep your affiliates up to date with any information that could make them send more customers your way – more revenue for you and therefore more cash for them.

12.5 Tools of the trade

Affiliate marketing today forms a fundamental part of most online retailers' strategies. So what tools does a merchant need to have a successful programme?

NOTE

This product feed can also be submitted to the Google Merchant Center (available in a few countries including the US and the UK). This will allow your products to be served as ads in the search engine results, leading to even more sales.

Any retailer should have a **product feed**, in either XML or CSV. A product feed is a way of providing information about the products on a merchant's website in a way that breaks up the information easily, and is standardised. A product feed will probably contain the following information for each product:

- Product name
- Product URL
- Picture
- Price
- Description
- Shipping price
- Stock status: in stock / out of stock

Affiliates, particularly search affiliates, can then use this to promote individual products.

A product feed is made available on a simple URL, and displays content that affiliates can use in their campaigns. You can view a product feed by visiting: <http://www.jr.com/category/audio/accessories/musical-instruments/pedalsand-effect-processors/pedals/n/4294563327/>.

NOTE

Read more about this in the *Online Advertising* chapter.

Merchants need to create a set of banners and buttons that can be placed on affiliate websites. At a minimum, the following sizes should be available:

- 468 x 60 (banner)
- 125 x 125 (square)
- 120 x 60 (button)
- 120 x 600 (skyscraper)

Having interactive banners, such as gift wizards or product searches, means that potential customers can interact with the brand before they even come through to the merchant's website.

If the merchant or the affiliate network hosts the banners, these can be updated without the affiliates having to do anything. This means that the message can be kept current across all of the merchant campaigns.

Merchants need to consider who will be **monitoring and driving the success** of the affiliate campaign. Merchants may be able to run the programme in-house with current staffing resources, or hire an affiliate manager. It is also possible to outsource the management of the affiliate programme to an agency that specialises in affiliate marketing.

Lastly, merchants need to **keep in touch** with their affiliates: the networks have channels for communicating with a large number of affiliates, but it is also worthwhile to interact on some of the affiliate marketing forums in order to keep informed.

What tools does an affiliate need?

Affiliates need to get to grips with the **spectrum of digital marketing tactics**, and choose what works best for them. Paid search affiliates will focus on PPC tactics, while affiliates running bespoke websites will probably put a lot of energy into SEO. It depends on where their talent lies, and where they see a gap in the market.

For affiliates, keeping up to date with merchants, other affiliates and the industry is probably the key to growth. That, and finding the time to put it all into practice! **Joining forums** and keeping tabs on industry leaders will help to do just that.

Some notable affiliate marketing forums:

- **Webmasterworld:** www.webmasterworld.com/advertising
- **Affiliates4U forum:** www.affiliates4u.com

12.6 Advantages and challenges

While affiliate marketing certainly deserves increasing recognition for its key role in growth, it is still a young industry with all the growing pains that that involves.

What is holding people back?

- **There are seldom contracts in place between affiliates and merchants.** For a merchant, this means an affiliate could decide to stop promoting the programme, with no notice given. This could lead to a sudden traffic

and sales drop, depending on how reliant the merchant had been on that affiliate. Similarly, merchants may decide to terminate a programme, meaning a loss of revenue for affiliates. Particularly if little notice is given, affiliates may have spent time and money setting up promotions, only to have the campaign pulled out from underneath them.

- **There is still little to no industry regulation**, although the majority of the industry does strive towards best practices. While some affiliates have resorted to shady practices in the past (with adware and email spam), the majority have banded together to blacklist this kind of behaviour.
- **Some merchants fear a loss of brand control.**
- **Affiliate programmes are not easily scalable**, since they often include a lot of admin and technical setup.

But, of course, there are so many benefits to affiliate marketing:

- It's **pay-for-performance marketing**, so merchants are paying only for growth.
- The merchant's **sales force just became bigger**, as well as its branding potential.
- There is a **very low barrier to entry** for both affiliates and merchants.

12.7 Case study

12.7.1 One-line summary

An ebook retailer turns to affiliate marketing and dramatically exceeds its traffic and sales targets.

12.7.2 The problem

The eCommerce market is highly competitive, and online shoppers tend to compare prices and look for the best deals, rather than staying loyal to a specific retailer. Because of this, retailers need to keep their prices low, leading to reduced margins and race to the lowest price.

Customer acquisition is therefore a priority for eCommerce retailers, and they often turn to a wide range of online marketing channels to find and attract new markets. The Search Agency worked with a well-known ebook retailer – which offers over 3 million products in 170 countries – to get their flagging in-house affiliate programme to deliver real results.

12.7.3 The solution

The Search Agency analysed the way in which the ebook retailer was running its affiliate programme and developed a solution that it called the 'Affiliate Triple A strategy'. It was structured in the following way:

- **Affiliate Acquisition** focused on finding and retaining a high number of quality affiliate partners. This involved creating a marketing campaign and recruitment programme aimed at these affiliates.
- **Affiliate Activation** involved creating special offers and deals to encourage affiliates to get on board. This included creating a basic informational guide to the programme and benefits, and contacting previous affiliates who had since stopped sharing the retailer's links.
- **Affiliate Activity** wrapped this up by encouraging sales and getting affiliates more deeply engaged in the programme. They created a merchandising calendar, banner ads, copy, and a product feed to inform and support the affiliates on the programme.

12.7.4 The results

Through proper planning, engagement and incentives, The Search Agency managed to smash the ebook retailer's target of 100% more sales over 12 months. Their actual results over were:

- A 200% increase in traffic generated by affiliates in 12 months
- A 321% increase in sales transactions generated from affiliate sources in 12 months
- Over 18 months, the affiliate-based sales transactions increased by 629%.

The success of the initiative meant that the retailer has now included affiliate marketing as a core component of their online marketing strategy. It has also allowed the business to expand its business in Australia and Europe.

12.8 The bigger picture

As affiliates are marketing in an online environment, they will use all of the tactics in this book. Some affiliates even run affiliate marketing campaigns for their own websites!

But as a merchant, how does affiliate marketing fit into the overall marketing mix?

For starters, affiliate marketing can allow merchants to add elements to their digital marketing with a fixed CPA. As an example, a merchant may want to promote their products through search advertising, but may lack the expertise to run a campaign. Instead of paying an agency, the merchant can recruit search affiliates to run search advertising, and the merchant will only ever pay for performance.

Working closely with affiliates, merchants can get many more case studies for analysing and optimising their websites, particularly when it comes to conversion. As affiliates are paid for performance, they will be more than willing to advise on ways to improve conversion rates.

Affiliate marketing can be used to complement other campaigns, offline or online. Making sure that there are banners to support these campaigns, the merchant can ensure a wider audience for their other marketing efforts.

Affiliate marketing allows for targeted traffic from niche websites. While the merchant can focus on a broad spectrum of websites, affiliate marketing allows for the targeting of niche traffic sources.

12.9 Summary

Affiliate marketing is performance-based marketing where merchants reward affiliates commission for successful referrals.

There are different types of commission, based on the merchant's industry:

- CPL
- CPA
- Revenue share
- CPC

The most essential element in affiliate marketing is tracking. Tracking software places a cookie on a user's browser when that user clicks on an affiliate link. The cookie period is determined by the merchant. If the user performs the desired action within the cookie period, the affiliate is awarded commission.

Affiliate networks are often used as an intermediary between affiliates and merchants. Affiliate networks provide tracking solutions, reporting and support to both affiliates and merchants.

Affiliates use a number of means to promote merchants. These include:

- Personal websites
- Content and niche sites
- Email lists
- Loyalty sites (points or cash back or charitable donations)
- Coupon and promotions sites
- Search advertising and search arbitrage

One of the keys to successful affiliate marketing is ongoing communication between merchants and affiliates.

12.10 Case study questions

1. 1. Why is having a strategy such an important part of running a successful affiliate programme?
2. 2. What role did each of the 'Triple A' strategy components play, and how did they build on each other?
3. 3. Why is affiliate marketing so well suited to this brand?

12.11 Chapter questions

1. 1. What factors should be considered when determining what commissions should be when you are planning an affiliate campaign? How do these differ for revenue-sharing campaigns and CPA campaigns?
2. 2. What is the difference between a lifetime cookie and a lock-in cookie? How do you think lock-in cookies affect the commission levels offered by merchants?
3. 3. Why do you think some affiliates run affiliate programmes for their own websites?
4. 4. How can a merchant try to ensure that their own marketing efforts do not overlap with those of their affiliates? Why would a merchant want to reduce overlap?
5. 5. As an affiliate, what factors would you look at before joining a programme?

12.12 Further reading

www.AffiliateProgramAdvice.com – affiliate advice from a team headed by Jess Luthi, who has been in the affiliate marketing industry since its start in the UK.

blog.affiliatetip.com – a blog from Shawn Collins, an affiliate since 1997 and founder of Affiliate Summit, the leading industry conference.

12.13 References

The Search Agency, n.d. *Affiliate Marketing Case Study: eBooks Retailer*. [Online] Available at: http://www.theseagency.com/sites/default/files/TSA_casestudy_eBooksRetailer.pdf [Accessed 5 June 2013].

13

Video Marketing

What's inside: An **introduction** to video marketing and the **key terms and concepts** you need for this chapter. We look at how to **produce an online video within a sound content strategy**, and how to **promote** it through paid, earned and owned media channels.

13.1 Introduction

Unlike text and even images, video offers an extremely rich, engaging and stimulating experience for viewers. With the increased availability of bandwidth and improvements in video technology, people have started watching and sharing videos on a scale never seen before. From music videos and funny clips of animals to reviews, how-to's and exciting commercials and movie trailers, people are turning to video for entertainment, information and valuable content.

In early 2013, Google was the world's largest search engine with almost 19.5 billion searches in January alone representing a 67% market share in the US (comScore, 2013). Interestingly, the second largest search engine was in fact YouTube, the popular video-sharing website. This indicates that people are turning to YouTube with precise, intent-driven behaviour: they're not just browsing randomly or waiting for a link to land in their inbox. YouTube boasts over 1 billion unique users per month (YouTube, 2013).

Online, we turn to search engines to help us answer questions and find content. That content can be anything, from images to text, and of course, video. Text content can be read by search engines, but content such as images and video cannot be read nearly as well. With more and more people using searches to find video content, understanding how to create videos for online and optimise videos for searching is an important part of any digital strategy.

According to YouTube, there are more than four billion hours of video viewed each month on its website, while every minute, 100 hours of video are uploaded (YouTube, 2013).

Videos can come from anyone, and from anywhere. Small home videos can experience massive global reach, as was the case with the popular *Charlie Bit My Finger* video which has accumulated 558 million views as of September 2013. Musicians often use social video platforms to share their music videos and, of course, brands use video-sharing platforms to communicate messages via video. People are increasingly interacting with brands via video by creating opinion videos, parodies and responses. More importantly, they have the power to market themselves, their ideas, who they are and what they do. For example, Laura Vitale has created a series of engaging cooking videos right at home – her informative and valuable videos (created on a budget) have garnered over 69 million views and 500 000 subscriptions.

Video content helps you connect with your audience, creating an experience and encouraging engagement.

In this chapter, you will learn:

- Why video marketing is such a powerful, versatile and effective marketing channel online
- How successful online videos are produced, step by step
- Paid, earned and owned methods of promoting your online video

13.2 Key terms and concepts

Term	Definition
Annotation	A comment or instruction (usually added as text) on a YouTube video. A YouTube annotation may contain links directing users to other pages within YouTube or, if a brand is willing to pay, to outside websites.
Captions	Text that appears over a video that labels a scene, identifies a location or person, or narrates dialogue onscreen. Captions can be either open or closed.
Embedding	Taking video from an online video provider and posting it elsewhere on the web.
Google AdWords	Google's search advertising program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
Meta data	Information that can be entered about a web page and the elements on it to provide context and relevance information to search engines.
Search engine results page (SERP)	The actual results returned to the user based on a search query.
Thumbnail	The still image that is shown at the start of the video. This can be selected, and can make a video more enticing.
Video search engine optimisation (VSEO)	Optimising videos for search engines, similar to the way in which one would optimise a website to rank higher on the SERPs.
Video syndication	The process of distributing and getting search coverage for videos.
Views	The number of times a video has been seen. Multiple views can come from one user.
Viral video	A video that becomes immensely popular, leading to its spread through word of mouth on the Internet via email, social networks and other hosting websites.
Vlogger	Video blogger. A person who produces regular web videos about a chosen topic on a video-enabled blog.

13.3 Video content strategy

Videos are powerful because they can have a strong emotional effect on viewers – it's no secret that funny, shocking, amazing and inspirational videos do particularly well online. Video is the ideal tool for experiential marketing – giving viewers the chance to experience something alongside the onscreen actors and consider how they would feel or act in that situation. It also helps to show off a brand's personality, tone and communication style.

Many people are still under the misconception that online videos are expensive and difficult to produce. That's not the case – the many millions of successful home video bloggers (vloggers) and marketers prove otherwise.

Unlike content made for TV, web video content can be filmed at a much lower cost and quality, using readily available home video equipment. Affordable high-quality cameras have made quality content production a reality for everyone. Viewers don't necessarily expect a super-slick offering (though even this is possible with some basic video editing software). To get started with making video marketing content, you will need:

- **A camera** – depending on what you can afford, this can range from a simple webcam or your mobile phone's camera to a (top-of-the-line) professional camera, though there are many excellent mid-range options available at a low price.
- **A microphone** – while some cameras have a built-in microphone, it's worthwhile investing in a proper mic to ensure that you capture better sound quality (built-in microphones tend to catch a lot of background noise at the expense of the main audio).
- **Video editing software** – you will need a software package to cut, edit and finish your video; there is a wide range of options, including free built-in software (Movie Maker for Windows and iMovie for Mac) and professional video editing suites (such as Final Cut Pro or Adobe AfterEffects), which can be more costly. YouTube also offers an online video editing tool.

NOTE

There are many useful, free resources and tutorials on creating videos online - www.wikihow.com is a good place to start looking.

13.3.1 Video content versus video ads

Video marketing covers two approaches:

1. **Video content:** These are videos made to entertain, inform, share updates or otherwise enlighten or delight the viewer. Much like syndicated articles or blog posts, these are usually not directly promotional, but instead provide shareable content that gives value to the viewer. Some examples

of video content include:

- How-to guides and tutorials
- Video presentations
- Educational lectures
- Entertainment
- Conference talks
- Valuable industry updates
- Product reviews and advice

2. **Video ads:** These are simply adverts that are filmed and formatted for online use. These can be existing TV commercials that are shared online, or custom ads made specifically for the web. We'll cover a range of options for posting your video ads below, in the section on paid video promotion.

NOTE

Think about it now: if your company or brand wanted to create content videos, what format and approach would you use?

13.3.2 Going viral

The holy grail of video marketing (and, in fact, any marketing on the web) is having a piece of content 'go viral'. This means that the content spreads from person to person through the web at a very high rate, attracting an exponentially growing audience as it gains popularity. The key to this viral effect is social media, where each user is connected to a wide network of others and can easily share content with their friends. Because this is a trusted social referral, it's more likely that they will view and share it themselves (if it's good enough).



Figure 1. A screenshot of the Will it Blend video on YouTube, indicating the number of times it has been viewed.

Nobody quite knows the secret recipe for getting content to go viral, and quite possibly there isn't one – the sheer variety and scope of viral videos shows that almost anything might catch the interest of the Internet on the right day. This means that it's very difficult to craft a video in order to make it go viral. But there are some principles that can help you make great video content with the potential for viral spread:

- **Address a currently trending topic.** Find something that people are already excited about or interested in, and see how you can contribute meaningfully to the conversation. For example, make your own edited version of a viral video.
- **Make it enticing.** Craft the video's description, title and thumbnail so that they draw attention.
- **Make it remarkable.** Whether it's funny, astonishing, scary, shocking or informational, your content has to have value for your viewers – and it has to give them social capital for spreading them.
- **Make it unique.** The Internet loves new, fresh, crazy ideas – so don't rehash somebody else's success or stick to a formula. Be truly creative and inventive.
- **Make it shareable.** Include the tools and incentives to make your video easy to share; consider social media chiclets, annotations, encouraging comments and more.
- **Make it short.** With very few exceptions, successful viral videos tend to be short, impactful clips. People have short attention spans, so make sure you get the message across quickly.

13.4 Video production step by step

Creating video content for the web is easy and cost effective. Consider the following process.

13.4.1 Identifying your audience

As always, you first need to identify the audience for whom you are creating this video content. What are their wants and needs? What video content are they already consuming? How can you engage their attention, provide something valuable, and promote your brand at the same time?

Some solid market research will reveal the answers to these questions.

13.4.2 Planning and concept

Now you need to come up with the core concept for the video, which will be dictated by what will resonate with your target audience. Will it be a once-off clip or part of an ongoing series? What marketing message do you hope to convey? Decide on the best style and tone in which to convey this.

Once you have decided these aspects, it's time to start planning your actual video shoot. You will need to write a script (or at least prepare a breakdown of what the video should include), and schedule the shoot – consider the venue, crew required, actors, and any other props or elements you need. How long this takes will depend on the complexity of the video you're planning.

13.4.3 Producing the video

Now it's time to get filming! Once you have all the footage and audio, you will need to edit it together, add any special effects and other elements, and save it as the final video.

13.4.4 Choosing and uploading to platform

Once you have the video, you need to decide where it will be uploaded to.

There are two options for making your video content available online. These are not mutually exclusive and there are techniques for both to ensure the best distribution and search coverage for your video. For example, you could be embedding videos posted elsewhere on your site.

Online video can be **hosted** on your own site, or it can be **posted** to one or many video distribution channels. If you post your video somewhere such as YouTube or Vimeo, it is then easy to embed it into your website as well.

The main advantage of posting a video to a third-party site is the opportunity to exploit an already existing audience quickly. These websites also usually have a built-in social and viral media aspect to their user experience. Video-sharing sites tend to have simplified algorithms which are easier to take advantage of, leading to more rapid universal search exposure.

YouTube (www.youtube.com) should be your first port of call when posting videos, since it is the biggest and most popular video hosting site on the web. Rather than posting a video under a normal username, create a branded channel – a YouTube 'home page' for videos created by your brand.

NOTE

For some helpful pointers and advice on producing your video, take a look at the Vimeo Video School: vimeo.com/videoschool.

YouTube channels allow you to add a logo, background, branded elements, a brand description and links to your other web properties. This means you can customise the page as you see fit. Channels also have a range of analytical features for measuring video engagement, and as an added bonus, they work well on mobile devices, too. Furthermore, you gain many benefits in ranking well on the world's most popular search engine – Google.



Figure 2. The Miller Genuine Draft Channel on YouTube.

Other good options for video hosting include:

- Vimeo (www.vimeo.com)
- MetaCafe (www.metacafe.com)
- Dailymotion (www.dailymotion.com)

If your video is hosted on your own website, the obvious advantage is that you have control over the whole website and environment in which it is hosted, from the look and feel to on-page text, meta data and user experience. When it comes to advertising and related content, you control both, and you decide how to monetise it. Traffic and links go directly to your website, and can therefore be integral to a longer-term search strategy. However, consider embedding your videos from your account on your chosen video-sharing site. Not only does this allow you to cross-pollinate content, but you will also gain more views via more points of entry.

NOTE

YouTube Analytics lets you see where people are viewing your videos – this can give you insight into your most effective video-sharing channels.

13.4.5 Optimising

At this point, you need to optimise your video for easy discovery on the web.

Most searching on the web is keyword based: you type keywords relevant to your query into a search box, and the results of the search should list content that matches your keywords. Whether you are using a search box on a website, on YouTube, or Google, this outlines the very basic way in which we expect the search function to work.

The search engine tries to match your keywords to the content it has indexed, and is also trying to determine how to rank the results so that you get the most relevant content at the top of your search results page.

This is all covered in great detail in the *Search Engine Optimisation (SEO)* chapter. Optimising video for search involves understanding the basics of SEO, and then the particular challenges and tactics of optimising video content.

Search engines rely on being able to use text in the content to determine what it is about, and other indicators to determine how relevant that content is. When it comes to web pages, search engines can 'read' the text on the page to determine what the page is about, and can measure the links coming in to determine how relevant the page is. When it comes to video, the search engine cannot 'watch' or 'read' the video in the same way that a human can (though there are technological solutions that are starting to make this possible). Instead, it must rely on other text on the page, as well as the meta data added, to determine what the video is about. The search engine also needs to look for ways to measure relevance.

Marketers and website owners now need to optimise all their various forms of content – be they text pages, images or videos – in order to achieve better rankings. Video search engine optimisation (VSEO) involves the use of basic SEO foundations and additional creative optimisation methods to ensure that online video content appears higher up on the SERPs.

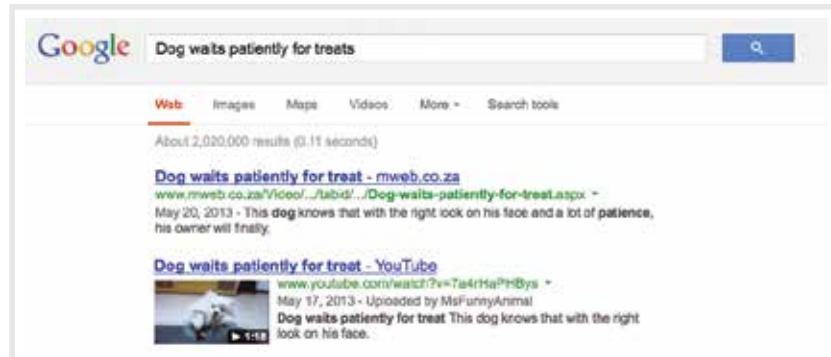


Figure 3. A search for the words “dog waits patiently for treats” brings up website and video results.

Optimising video for video-sharing sites such as YouTube means that you will appear not only in search results on the video-sharing site, but also on SERPs such as Google. While each video-sharing site will use its own algorithm, the guidelines below can be considered best practice across most of the video-sharing sites.

1. Video title is very important.

Video title is one of the first things a user sees when clicking through to a video, and is used first and foremost by the video search engines to determine the relevance of your video to the search query. Your most important keywords should appear in the first three words of the title. Longer, descriptive titles are better than short, concise and obscure ones.

NOTE

If you are creating a video series, use a standard naming structure for the title to make all the videos easier to find.

Title:

Sowing the Seeds for Rocking the Daisies

Figure 4. Video title.

2. Use informative, long descriptions.

Descriptions will contain key terms that search engines should be looking for to determine what the video is about. Use your most important keywords here! You can include as much information as possible, but put the most important stuff in the first 25 characters. You can include a link in your description, enabling you to direct users to other content that you have.

Description:

To check out more of our rocking videos, visit <http://www.rockingthedaisies.com>

Sowing the Seeds is an annual teaser music festival giving music fans a taste of what to look forward to at Rocking the

Figure 5. Video description.

3. Use the tags to input several keywords.

Put your most important keywords first. You can also capitalise on popular search terms and piggyback on popular or topical phrases. YouTube will use your tags to help categorise your video. Ensure that these are relevant to your video, and utilise terms from the same category.

Tags:

"the dirty skirts" "7th son" "seventh son" aking "a king" "aking lyrics" "aking band" "aking music" "jeremy loops" "hot water band" "rocking the daisies" "rocking the daisies tv" "rocking daisies" "rockin the daisies" "rocking the daisies 2011" "music festival" "music festival 2011" "music festivals" "music

Figure 6. Video tag.

YouTube Suggest and Google Suggest are useful tools for generating ideas.

4. Encourage comments, subscriptions, ratings, embedding and sharing.

Get people to engage with your video in any way you can, and don't forget to respond to relevant comments – it's critical that your budding community feels that they matter and that you are taking them seriously. This is a key point to remember if you want to create a thriving community. Engagement is a massive factor in search engine rankings, so it is very important to focus on content – strong optimisation is no substitute for weak content.

To incite discussion, consider posting a comment as soon as you have uploaded a video, or adding an annotation to encourage feedback. Pose a provocative question to spark discussion and lead the conversation – the absolute key to success in the social media space is engagement.

that girl at 0:28 got owned!

kingofkeyboards 1 year ago 2 👍

man i'd love my band to be there next year! glastongury would be the ultimate gig! jhon peel sounds a brill stage, i'd love to play there! :)

sarahjanerulez 1 year ago

Figure 7. YouTube comments.

5. Optimise the thumbnail.

Consider adding an enticing thumbnail frame. YouTube allows you to choose any moment in the video to be the thumbnail. Simply optimising the thumbnail image can encourage increased clickthroughs and views, which helps to increase search visibility.

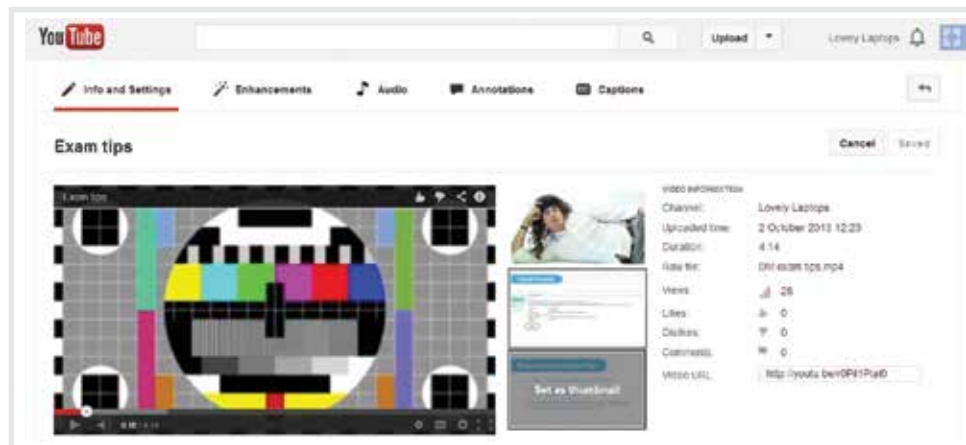


Figure 8. Three thumbnail choices on a YouTube video.

6. Use annotations

Use annotations to link to and from other video properties. Annotations allow you to add text boxes with clickable URLs (which are crawled by the search engine spiders as well) at points of your choosing in your video. Annotations in already popular and current videos can be used to drive traffic to new videos, although it should be standard practice to include them in a video as soon as it has been uploaded. It's also a great way to encourage viewers to subscribe to your YouTube channel.

The nature of YouTube is such that the number of views for pages on which videos are watched is always higher than channel views. However, if a paid search campaign is being run, the option to play clicked videos on the channel page exists. This is optimal as it could boost interactions with the branded channel header image, increase engagement with the playlist, and raise the channel view stats.

7. Upload videos regularly

Upload videos regularly to ensure continuous channel activity and topical interest. Consider the nature of the brand and what you are trying to communicate to your viewers; you must decide how often videos are uploaded. But remember, the more videos you upload, the higher your channel will rank as a result of Google picking up on your fresh content. Think of it like a TV schedule – let people know when your 'show' is on so they know when to come back.

The amount of content you upload is also dependent on the service or product your brand offers, and your video budget. It's a careful balance of not overloading your channel with useless media and keeping content fresh and engaging.

13.4.6 Promoting

We've covered promoting your video in detail in the next section. There are three ways you can promote your video – using owned, earned and paid media channels.

13.4.7 Engaging the community

As we mentioned earlier, it's essential that you engage with your community to keep them coming back for more. Respond in a timely manner to any comments or questions, and take feedback on your content into account when planning new videos. The audience won't stay hooked for long – after all, there are millions of new videos being added every day – so ensure that you engage with them to create a sense of community, the ability to relate to them, and genuine interest.

3.4.8 Reporting

As with all digital marketing tactics, in video marketing it's essential to track and analyse data about your activities, and then optimise your strategy accordingly. When creating video content, use the various measurement options available to determine what you can do better going forward.

YouTube Analytics is a free tool that enables anyone with a YouTube account to view detailed statistics about the videos they upload to the site. You can see how often videos are viewed in different geographic regions, as well as how popular they are relative to all videos in that market over a given period of time.

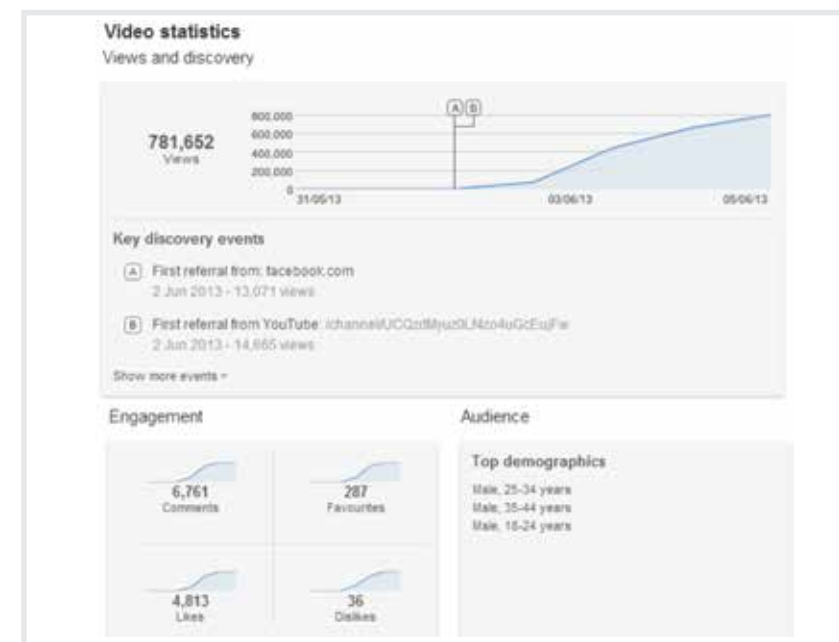


Figure 9. Analytics information from YouTube.

NOTE

A great way to use annotations is to link to some of your other videos at the end - this works similarly to "articles you may like" at the end of a blog post.

You can also delve deeper into the lifecycle of videos, such as how long it takes for a video to become popular, and what happens to video views as popularity peaks. YouTube even breaks down the specific seconds when people stop watching the video.

Using these metrics, you can increase your videos' view counts and improve popularity on the site. For example, you might learn that your videos are most popular on Wednesdays, that they have a huge following in Spain, or that new videos that play off previous content become more popular more quickly. If you see people dropping off halfway into the video, add an annotation to mix things up. There are many creative ways to approach this.

With this information, you can concentrate on posting compelling, fresh content that appeals to selected target audiences, and post these videos on days when you know these viewers are on the site. You could even go a step further and customise the video, dubbing it in Spanish (closed captions also support SEO efforts). The range of possibilities to customise – and optimise – your content is limited only by the brand's level of willingness.

Furthermore, you can access a breakdown of how viewers discovered a specific video, which can then be used to optimise the keywords, tags and descriptions of videos.

13.5 Video promotion

There are four main ways in which users find content and video online:

- A user knows what sort of video they are looking for and goes directly to a search engine to search for content. This relies on **SEO** (or search advertising, if you decide to promote the content on Google).
- A user follows recommendations from others, found through emailed links, social bookmarking and sharing services, or social media such as blogs, Twitter, Facebook, and YouTube. This relies on **social sharing**.
- Someone knows exactly what they are looking for and navigates to the appropriate URL directly. This relies on good **branding and market awareness**.
- The user finds the video through paid advertisements and promotions. This relies on **paid advertising**.

13.5.1 Earned video promotion

We covered the general guidelines for optimising your video for search earlier in this chapter. Here are some specific considerations for YouTube search optimisation, as well as social sharing.

YouTube video search optimisation

YouTube, which is owned by Google, is the dominant player in the video-sharing market. While we focus in this section on optimising for YouTube in particular, many of the same approaches apply to other video-sharing sites.

Once you've determined how users are already accessing your videos and where they appear in SERPs, you can use various techniques to improve your rankings.

While YouTube, like Google, keeps its search algorithms a closely guarded trade secret, digital marketers can speculate and experiment to see what works (and what doesn't).

Firstly, the following components are evaluated on a keyword and key phrase level by the search engine spiders:

- Titles
- Descriptions
- Tags
- Playlist additions
- Inbound links

Additionally, YouTube defines relevance in accordance with the popularity of a given video as well as the interaction taking place around it. The following factors play a dominant role in the algorithm:

- Video views
- Channel views
- Ratings
- Comments
- Shares
- Embeds
- Subscribers
- Age of video

Keeping YouTube content current and entertaining is vital if a video is very new. This will allow the video to engage with viewers. Remember, a new video growing in popularity (that is, views), will take preference in the SERP over an older video with more views.

Social sharing

You should initiate and encourage social sharing – ask your viewers to post your video on social networks, aggregators, social bookmarking sites and other channels. The more people share, the wider an audience you can potentially reach – and the more likely your video is to go viral (or, at least, spread far and wide). Social sharing and recommendations are also increasingly relevant ranking factors for search engines.

13.5.2 Paid video promotion

In the same way as with Google's search advertising, you can pay to have your video recommended on YouTube. You are able to bid on searches or popular videos, show pre-rolls on other videos, and have your video content displayed alongside the search results of other videos.

Paid promotions on YouTube are a cost-effective and quick way to promote video content, especially if the content is topical. It's targeted and controlled. For InStream, you pay only when a user watches 30 seconds or more of your video, or, if your video is shorter than 30 seconds, you'll pay only if they finish watching the entire clip. For InSearch and InDisplay, you pay per click on your video. This is a great opportunity for brand awareness, coupled with a potentially lower cost.

However, some users find this form of advertising highly intrusive, particularly in markets where bandwidth is slow and expensive, and it may take several seconds for the ad to load before it can be skipped. Some ad blockers block YouTube advertising.

YouTube offers a wide variety of video ad types:

- **TrueView In-Search:** These video ads appear to the right of the search results on the YouTube search pages. These ads are triggered by keywords, so it's important to know what users are searching for and ensure your ads contain the right keywords.
- **TrueView In-Display:** These ads appear to the right of the YouTube video the user is currently watching.
- **TrueView In-Stream:** These ads appear at the start of regular YouTube videos. Viewers have the option of skipping these ads after five seconds.

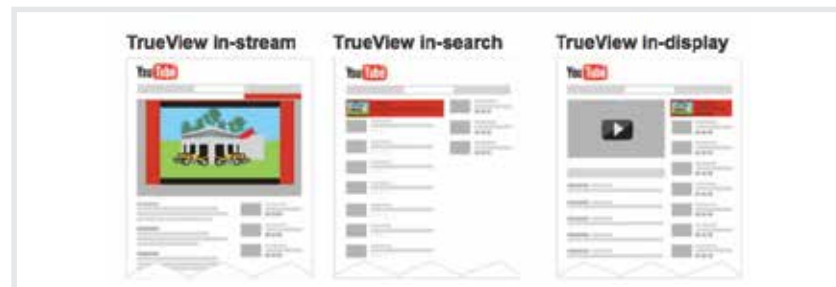


Figure 10. YouTube advertising options.

Be sure to check out the YouTube Trends dashboard (www.youtube.com/trendsdashboard) to stay on top of the most popular videos at any given time.

13.5.3 Owned video promotion

If you are hosting your video content yourself, you can and should still optimise the content around it for best search opportunities. As with posted video, it's the text content on the page with the video that is so important.

Make sure that your page title is descriptive, as well as the video title and the video file name. The text on the page with the video is important, so optimise it to reflect the content of the video.

You can also use speech-to-text software such as Blinkx or Spinvox to transcribe the video. The text can then be used in the video meta data.

Use social media sharing chiclets to make it easy for visitors to share the video on their social networks, aggregators and blogs. If you have a Facebook page, post it there. If you have a Twitter account – tweet about it!

And don't forget to drive website visitors to your video content – put a link or strong Call to Action on your home page or main landing pages, to encourage visitors to view and engage with your videos.

13.6 Tools of the trade

When it comes to video content, there is a wide range of tools at your disposal. Most of these are listed in the chapter already, so look at the relevant sections for pointers on what to use.

YouTube is the king of video content marketing and offers a full suite of tools – from video hosting and optimisation to paid advertising, analytics and social promotion.

AdWords for Video (www.google.com/ads/video) is a feature of Google's AdWords PPC tool that allows you to link your existing Google paid advertising account to your YouTube channel, and manage all your YouTube advertising from a single interface.

TubeMogul (www.tubemogul.com) is a video advertising tool that lets you buy paid video placements across the web. This simplifies the process of placing and paying for video adverts.

Feed (feedcompany.com) is a video seeding tool – a very handy thing to have if you host your videos on a variety of video platforms. Video seeders allow you to upload the video once, and then automatically upload that video to all of your chosen profiles and platforms for you.

Brightcove (www.brightcove.com) is a leading video hosting and publishing platform. Brightcove Video Cloud gives you everything you need to deliver professional quality video to audiences on every screen.

NOTE

The video you use for these ads doesn't have to be an advert in itself – you could choose to promote some of your regular video content too. Ensure that the key message appears in the first few seconds, to get viewers intrigued enough to keep watching.

13.7 Advantages and challenges

Posting regular video content shouldn't result in any negativity, provided it is done in a focused, engaging way. Videos are great for engaging viewers and growing your social media community.

By studying analytics, platform insights and comments, you can see which videos on your channel are providing users with what they're looking for. You can then choose to advertise your best videos with the various formats YouTube and Google have on offer.

The number of views you get is an important factor in getting ranked or featured on YouTube and, by pushing your best content through the paid medium, you can get the ball rolling and significantly increase your chances of picking up organic traction (both within YouTube and Google's universal SERPs).

Starting out with video production can be a bit challenging as you learn the ropes of what makes a viewable, entertaining video. It can also be difficult to come up with constantly new and interesting ideas – but this will become easier with time.

Optimising video can also take a while to show results (as with normal SEO).

13.8 Case study – Woolworths: 'Cook like a MasterChef' for MasterChef South Africa

13.8.1 One-line summary

A case study about Woolworths and Quirk using video advertising and marketing to generate brand awareness, increase customer engagement and create product associations between Woolworths and MasterChef.

13.8.2 The problem

Woolworths is a premium national retailer that stocks apparel, food and homeware. As a MasterChef South Africa sponsor, Woolworths wanted to maximise this association for brand benefit. Their goal was to increase brand awareness for Woolworths through customer engagement, and highlight associations between their products and MasterChef South Africa. To meet these goals, Woolworths partnered with Quirk, a marketing agency specialising in creative, results-orientated digital marketing.

13.8.3 The solution

Quirk leveraged MasterChef-themed video content to launch MasterChef South Africa at scale on various digital platforms. The videos showed gourmet cooking of various cuisines to inspire

food enthusiasts. The video marketing strategy utilised the MasterChef brand to achieve its goals, which included:

- Producing great video content
- Effective targeting to drive traffic
- Engaging with users on platforms with video content

Producing great video content

The team made sure that their video content followed best-practice principles and provided lots of value to viewers in the form of great quality and entertainment. For example, they ensured that the first five seconds held the viewer's attention and clearly stated the benefits of watching the full video. They uploaded videos according to a consistent schedule to maintain audience interest and set expectations. Video titles were crafted to incite users to click, and formed part of a larger playlist, ensuring the viewer always knew where to click next.

Effective targeting to drive traffic

To ensure the campaign was a success, the team used a series of channels to drive traffic to the videos. Google search and display advertising, YouTube ads and Facebook advertising were used to drive paid traffic directly to the videos. Videos were also shared on the existing Woolworths blog, Facebook page and Twitter feed.

Quirk negotiated with Google to allow Woolworths to use YouTube functionality that allowed users to click out to the Woolworths site) from within videos. Externally linking directly to the Woolworths website from YouTube in this way was a first in Africa.

During the video, annotations directed viewers to bespoke recipe pages on the Woolworths online store, or subtly encouraged them to subscribe and share the videos easily with their connections.



Figure 11. One of Woolworth's 'Cook like a MasterChef South Africa' campaign videos.

Engaging users directly

Engaging with users directly drives better engagement. Strategies to encourage this included asking viewers about their video experience and requesting suggestions for future improvements to be incorporated.

13.8.4 The results

The video marketing campaign achieved solid results and met all the intended goals. Throughout the process, the video content and campaigns were optimised with weekly insights, which were gathered from AdWords for video, YouTube Analytics and Google Analytics.

The aim was to get a view rate of at least 10% and a cost per view of under \$0.20. The most cost-effective engagement and awareness driver was AdWords for Video. Between 20 March and 31 July 2012, it generated:

- Over 18.2 million impressions
- Over 109 000 views
- 17 332 clicks
- A cost per view (CPV) of \$0.16.

Overall, the video content was well utilised to meet the brand goals, maximised reach and engagement of the video assets on relevant cost-effective platforms. Finally, it met the overarching goal of facilitating brand association with MasterChef South Africa and Woolworths.

13.9 The bigger picture

Video marketing can form the cornerstone of a great content marketing strategy, linking closely with the other content that you create to engage and provide value to your customers.

Videos can also be added to marketing messages such as email newsletters to improve engagement.

Because search engines serve a range of media types on their results pages, video content plays an important role in search engine optimisation. Not only can optimising videos for search increase your search engine ranking, but data show that it increases clickthrough rate from the search engine results pages, and that these visits are longer and more engaged than other search visits.

Social media provide a great tool for spreading your video, and video content can be a strong driver for people to join your social media platforms. Make sure that you provide great value.

13.10 Summary

Video has become an integral part of the online world. The potential for exposure – as well as interaction – is massive, and brands that fail to capitalise on this risk being left behind as competitors build thriving communities.

As with most content, it is up to the brand to decide how to represent its video content. Videos can be hosted on popular video-sharing websites to capitalise on already existing audiences and developed interfaces, or on bespoke websites that allow for free reign in customisation.

Brands should then aim to optimise their videos on the chosen platforms to increase their visibility on search engines.

Creating a healthy community is also important in increasing exposure. Very rarely, if ever, does an audience come to video content without input from the creators. On top of optimising for search and other tweaks, brands should upload content regularly or risk losing any ground gained.

Social media should also be considered as its platforms allow for the sharing of content, as well as commentary.

Overall, brands should be aware that there is no quick fix for video. It requires planning and investment as well as long-term commitment to creating brand advocates.

13.11 Case study questions

1. When producing video content, what key points do you need to keep in mind?
2. Why is the way in which the video appears as part of the playlist important?
3. What are the strengths and weaknesses of different types of paid advertising?

13.12 Chapter questions

1. Why should commenting on videos be encouraged?
2. What sort of personalisation would self-hosting of a video allow?
3. How do you feel social media affects video marketing?
4. What possible obstacles could a brand face when seeding a viral video?

13.13 Further reading

www.reelseo.com – Regularly posts updates and developments in the world of online video.

www.youtube-global.blogspot.com – YouTube’s official blog. If there are announcements likely to affect a YouTube user, this is where you’ll find them first.

mashable.com/category/online-video – Insightful and current articles on online video trends.

vimeo.com/channels/staffpicks – Curated Vimeo videos picked by staff members – some great creative inspiration.

www.reelseo.com/online-video-monetization-what-are-your-options – Some people aim to make money from their online videos by creating excellent content, rather than relying on marketing. Here are some guidelines about this.

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14

Social Media Channels

What’s inside: An introduction to **social media channels** and **the important differences** between these and more **traditional forms** of media. You’ll find an explanation of the categories into which these channels fall – **social networking, content sharing, aggregation** and **location** – as well as the powerful role they can play in the marketing process.

14.1 Introduction

In many ways, social media epitomises what the web is about: collaborating and sharing content, ideas and information. Social media is behind the explosion of content on the Internet, as various channels have allowed anyone with an Internet connection to create and share content easily and for free. Because social media has so many participants, it is also very dynamic. In fact, this is the chapter that is most likely to be out of date the second this book has gone to print.

Simply put, social media are media (from written to visual to audio) that are designed to be shared. Sharing means that it is easy to comment on, send and copy the media, and that there are no high costs associated with this. And, because of the connected nature of the Internet, it means that sharing, commenting and viewing can all be tracked and measured.

Social media are also referred to as Web 2.0, consumer-generated media, citizen media and new media. In fact, comparing social media to traditional media is probably the most useful way of defining what exactly this means.

Traditional Media	Social Media
Fixed, unchangeable	Instantly updateable
Commentary limited and not real-time	Unlimited real-time commentary
Limited, time-delayed bestseller lists	Instant popularity gauge
Archives poorly accessible	Archives accessible
Limited media mix	All media can be mixed
Committee publishers	Individual publishers
Finite	Infinite
Sharing not encouraged	Sharing and participation encouraged
Control	Freedom

NOTE

You don't need sophisticated coding or technical skills to set up your online presence any more. Most services provide pre-made templates, widgets and tools that allow you to jump right in.

The Internet, and the software developed to run on it, has made it simple for anyone to publish and distribute media. It has also made it simple for anyone to access the content that has been published.

The realm of social media is about collaborating, creating content, sharing and, most of all, connecting.

This chapter focuses on the various social media channels, while the next chapter looks at how to use those channels strategically.

In this chapter, you will learn:

- The four main social media channels – social networking, content sharing, bookmarking and aggregating, and location-based media
- A wide variety of platforms that fall under these four channels
- How to track and measure your social media marketing success
- The best ways to engage with audiences on social media

14.2 Key terms and concepts

Term	Definition
Blog	A type of website that allows users (bloggers) to post entries on different topics and often allows readers to comment on these posts.
Blogosphere	The world of blogs, bloggers and blog posts.
Bookmarking	Saving the web address of a web page so that you can easily refer back to it. Bookmarks can be managed with a browser, or with an online tool.
Crowdsourcing	Taking a job traditionally performed by a professional and distributing it to an undefined, generally large, group of people in the form of an open call.
Chiclets	A small icon adjacent to a blog post, article or web page to indicate the availability of an RSS feed, or to allow users to share the information via social media. Named after the gum of the same name because of its unique, pillow-shaped icon.
Forum	A website where users can engage in discussions by commenting on threads or previous posts made.
iFrame	Stands for inline frame. An HTML structure that contains another document which you can draw information from another website to display, such as with Facebook tabs.
Microblogging	The practice of publishing brief text, image and video updates, usually limited to between 140 and 200 characters.
Permalink	A unique URL that points to the permanent location of a single blog post and its associated comments and TrackBacks.

Social network	In the online sense, a type of website model where individual members become part of a broader virtual community.
Tag	In social media, tags indicate or label what content is about.
Taxonomy	Classification and division into ordered categories, usually hierarchical. In social media, taxonomy can refer to the categorisation of content on the Internet.
TrackBack	A mechanism used in a blog that shows a list of entries in other blogs that refer to a post on the first blog.

14.3 Social media channels

Social media has changed the world of marketing. Social media is all about the ways in which we create, connect and share content online, and can be used as an integral part of an online marketing campaign.

To keep up with their audiences, traditional media have had to adapt. This has changed the way in which they publish, both online and offline, as well as how they can sell advertising.

For example, many newspapers now publish their content online as well as in their print publications. Online, they can get instant commentary on their articles. This snapshot of what their readers think can then be used to make editorial decisions. Print stories can be supplemented online with video, and this has been embraced by many news organisations. Visit www.bbc.co.uk/news/video_and_audio to see how one newspaper is using video online. News also comes from citizen journalists – people on the ground who post instant updates to social media about events unfolding around them.

The following chapter addresses the strategic use of social media to achieve a variety of outcomes. Here we look at the various social media channels. Categorising social media into channels is challenging, but it is a useful way to compare them.

And not all platforms fall neatly into one channel – for example, Twitter is part microblog, part social network, part aggregator, and even includes some location-based elements. We've categorised the platforms below according to their dominant properties, but always keep in mind that these aren't exclusive and may change as social channels adapt to meet their users' growing requirements.

Social media channels can be categorised as:

- **Social networks:** social channels that are built around social profiles.
- **Content creation:** using social channels to create and share content.
- **Bookmarking and aggregating:** social curation and sharing content.
- **Location:** a subset of social networks that are based on location.

NOTE

These are broad groups, not absolute categories. One platform could have the characteristics of several channels, for example.

14.4 Social networking

Social networking refers to forming and maintaining online social networks for communities. The communities are people who share real-world connections, interests and activities, or are interested in exploring the interests and activities of others. And to complete the definition: building these social networks requires the use of software.

Social networking is all about using the tools of the Internet to connect and build relationships with others. Social networking sites such as Facebook (www.facebook.com), MySpace (www.myspace.com) and LinkedIn (www.linkedin.com) allow users to create personal profiles and then interact with their connections by sharing media, sending messages and blogging. Not only do social networking sites allow you to interact with the members of your own virtual Rolodex, but they also allow you to extend beyond your personal network. In addition, organisations – anything from businesses to bands and charities – can also create and maintain profiles on many of these networks.



Figure 1. LinkedIn, a professional social network.

Social networks have created new meaning for the term 'friend', with many connections existing solely online. In the realm of social networking, it is unnecessary to have met someone in order to connect with them.

NOTE

To see how much of your social data is being shared publicly, try logging out and viewing your profiles as an anonymous viewer. Are you surprised by what you see?

Personal profile pages remove much of the anonymity of the Internet. Users of social networks reveal a great deal of information about themselves, from basic demographics such as age, gender and location, to nuanced and detailed lists of likes and dislikes. They are also divulging this information to the networks, and hence to the networks' advertisers to allow more relevant targeting. Users tend not to be aware of the data that is amassing in their online profile, and this can lead to privacy risks and concerns.

Social networks can be general, such as Facebook, or niche, such as LinkedIn or Dopplr (www.dopplr.com). LinkedIn is a network for business professionals. Members connect to people they know professionally and are able to recommend members they have worked with. Dopplr is a social network for frequent travellers. Members can share their trips, and make plans to meet up when schedules overlap.

There are social networking platforms that allow anyone to build their own social network using the underlying technology of the platform. One example of this is Ning (www.ning.com).

14.4.1 Facebook

Facebook has become the most dominant personal social network in the world. According to official figures, over 1 billion people are now registered on the platform – that's one in every seven humans on earth – and more than half of them are active on Facebook every day (Facebook, 2013). Because people are spending so much time on Facebook, advertisers and marketers naturally want to capitalise on this audience.

Over the past few years, Facebook has launched a number of ways for brands and organisations to use the social network to connect with potential customers.

Pages

A Page is profile for a brand, organisation or celebrity. It looks very similar to a personal profile, and in the same way in which two people can add each other as friends on Facebook, people can choose to connect with a brand on Facebook by liking its Page.

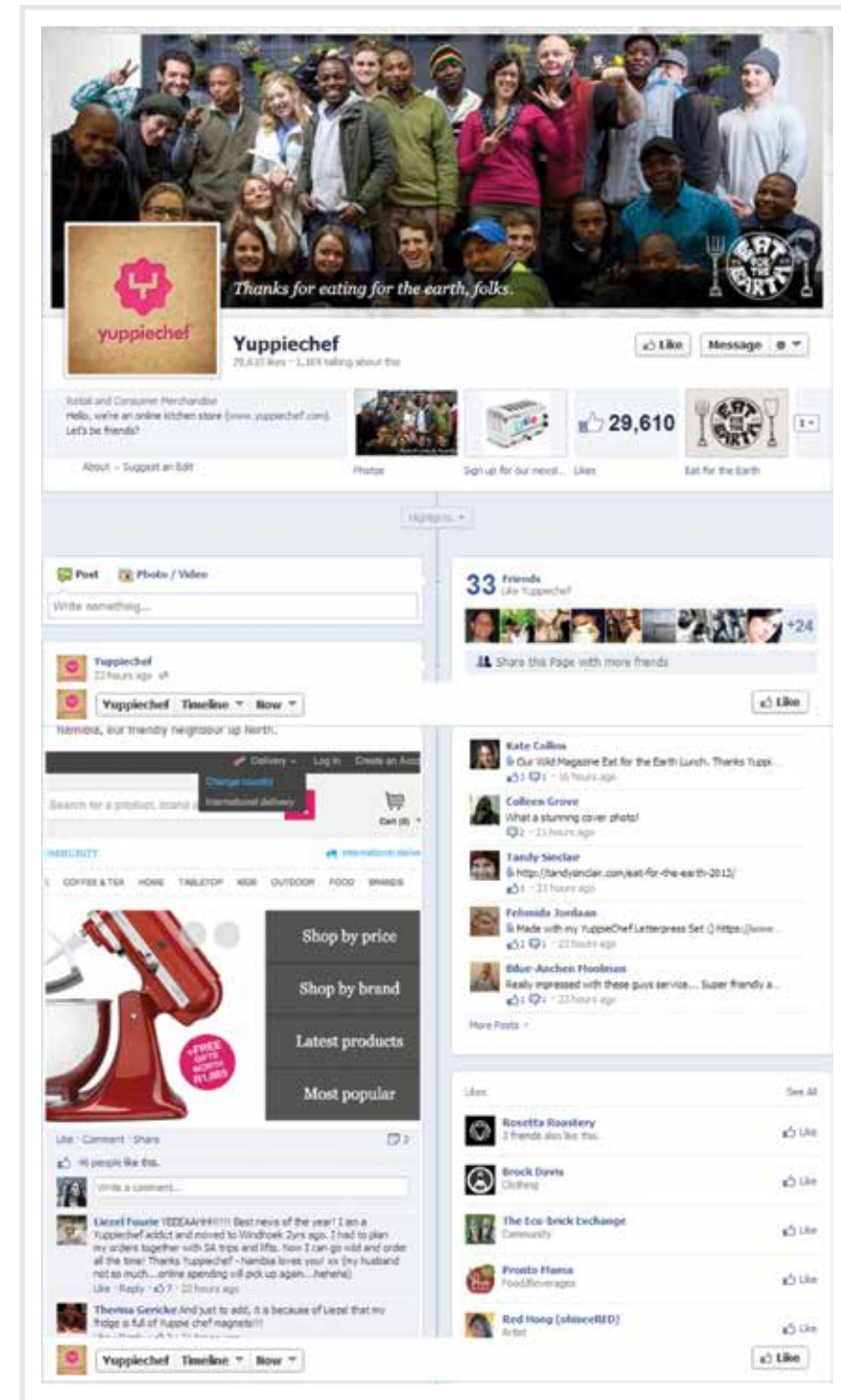


Figure 2. The Yuppiechef brand page on Facebook.

Each Page consists of the following elements:

- A cover image (the large banner at the top)
- A profile image that represents the brand
- Some 'About' information that can include links and more detailed information
- The 'Wall', where the brand's posts and interactions are displayed in a chronological timeline

Tabs are distinct pages of information on the brand's Page. Tabs can be used to house richer, more graphic content. Information in the tabs can be served through an application or through an iFrame, allowing for interactions within them.

Applications

Applications are developed by third parties, and include games such as Farmville (www.facebook.com/farmville), contests, virtual gifting, photo uploaders, interactive tools, and more.



Figure 3. Facebook applications on the Skittles Facebook page.

Applications are a way for organisations to create branded experiences for their Facebook fans. Sharing can be built right into the application, exposing it to the user's Facebook friends, and making it easier for the user to invite friends to use the application as well.

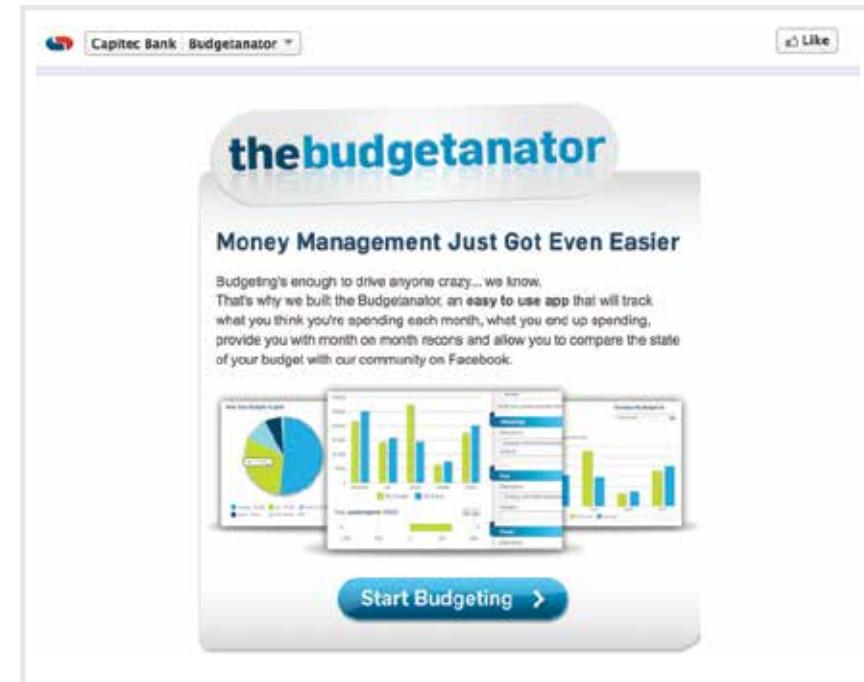


Figure 4. The Budgetanator is an example of a Facebook application developed for Capitec Bank. It provides a convenient way for people to manage their budgets.

Facebook makes frequent updates that may affect applications, so they've made several developer resources available. The one to watch is the Developer Roadmap (developers.facebook.com/roadmap).

Promotions and competitions

Brands can run promotions and competitions through their Facebook Pages, but must ensure that they comply with Facebook's terms and conditions. Wildfire (www.wildfireapp.com) is an application that can be used to run promotions on Facebook.

Facebook Connect

Facebook Connect allows users to log into services external to Facebook using their Facebook login details. They can then grant permission to have information, such as profile data and photos, shared between Facebook and the service they have logged in to. This can make it easier for users to log in to new services without having to create new usernames and passwords. They can also easily see who else in their social circle is using that service, and share information back to their social circle.

NOTE

Read more about Facebook competition regulations here: www.facebook.com/page_guidelines.php

NOTE

You can set up your own Facebook Like button from here: <https://developers.facebook.com/docs/reference/plugins/like/>.

Like button

The Facebook Like button allows users to indicate that they like or recommend content, images, media or websites, and to share that recommendation with their social circle. The Like button can be used by any website, allowing visitors to recommend their site and content easily, and to see who of their friends might like the same content.

News feed

The news feed is the stream of content that users see when they log in to Facebook. It's a selection of recent posts and updates from their friends, and from the brands with which they have connected on Facebook. Facebook uses an algorithm, based on relevance to the user, to determine what information to show in their news feed.

This algorithm is called the News Feed Algorithm, and is a more sophisticated version of the original algorithm, which was called EdgeRank. According to an official Facebook update, the following factors are considered by the algorithm before it displays content in a user's news feed:

- Is this timely and relevant content?
- Is this content from a source you would trust?
- Would you share it with friends or recommend it to others?
- Is the content genuinely interesting to you or is it trying to game News Feed distribution? (e.g., asking for people to like the content)
- Would you call this a low quality post or meme?
- Would you complain about seeing this content in your News Feed?

(Facebook, 2013)

Brands want their Page posts, stories and comments to appear in a user's news feed. The user is more likely to interact with content in the news feed, or to follow through to the page, than if there were nothing to prompt them. It is therefore vital to ensure that your page content takes this algorithm into consideration.

14.4.2 Google+

Google+ is Google's answer to social networking giant Facebook, and is slowly but surely being integrated into all of Google's products.

Google+ provides seamless ways to interact through Circles, Hangouts, Local information and more.

- Circles allows users to create customised groups (friends, family, classmates, and so on) and target their sharing to just the right people. By using Circles, users are able to limit sharing by breaking up their network into distinct clusters of contacts.
- Real-time communication is available through Hangouts, where users enter video chat rooms and let others know that they're interested in chatting. If users are already chatting within a circle, other circle members will be notified and can join in.
- Google+ Local integrates user data based on the person's location, and shares information about nearby businesses, events, places and user reviews pertaining to where the user is.

14.4.3 Social networking as a marketing tool

Social networks, which are usually free for their members, tend to rely on advertising for their revenue. Because demographic and psychographic information is collected by the social networks, advertisers are able to target their adverts to a very specific audience segment.

Most social networks offer opportunities for brands to create a presence on the social network, and to make use of the existing social network to connect with and reach out to customers.

14.5 Content creation

YouTube may be the first content-sharing site that comes to mind, but users share images, audio and other media, too. If it can be created, it can be shared. There are many sites that make it easy to share videos, images and audio, and they are exceptionally popular. From Instagram to YouTube, they have all tapped into the fact that we love to create content for others to view.

The key word here is free: there are no fees for joining, whether you are uploading or viewing content (although premium paid-for memberships can provide added features). This means that these sites attract an enormous audience. In fact, according to Alexa rankings, YouTube is the third largest website in the world (Alexa, 2013)!

Many of these services also encourage distribution of their content. YouTube allows videos to be embedded easily into other websites, and Flickr has generated a number of applications and widgets that allow the images to be shown all over the web (and even printed onto cards and stickers via www.moo.com).

NOTE

People come to social networks to socialise and connect, not to see marketing messages; try to respect this by keeping your presence personal and valuable.

Most of these websites rely on advertising to support the free services they offer. Some do, however, have premium memberships that are advert free.

14.5.1 Image sharing

People love to share photos, images, art and funny pictures online. Images tend to attract higher engagement than text-only posts (as you saw with Facebook's EdgeRank above).

Flickr (www.flickr.com) is a website that allows users to store and share their photos online. Users can publish these publicly or share them privately with chosen connections.

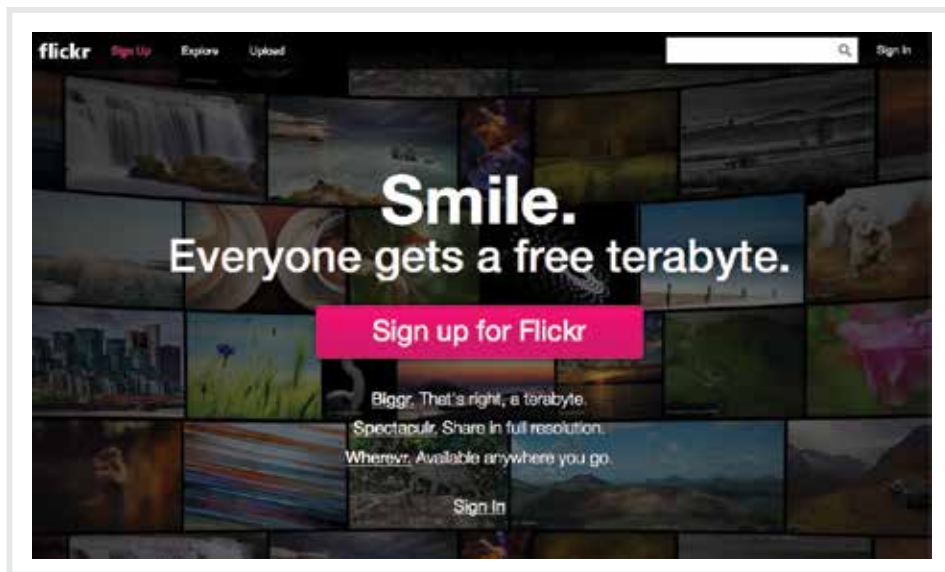


Figure 5. Flickr.com, a photo-sharing network.

NOTE

Instagram (instagram.com) is a mobile-based photo app that allows you to take a picture with your phone camera, and then add an interesting artistic filter to make it look polished and beautiful. These can then be shared on social networks for followers to view and comment on.

Pinterest (pinterest.com) takes image sharing to a new level by allowing users to create virtual pinboards of their favourite curated images (either their own ones, or images they have found online). These boards are usually grouped by topic or theme; images can be shared, commented on, or 'repinned' to another user's board.

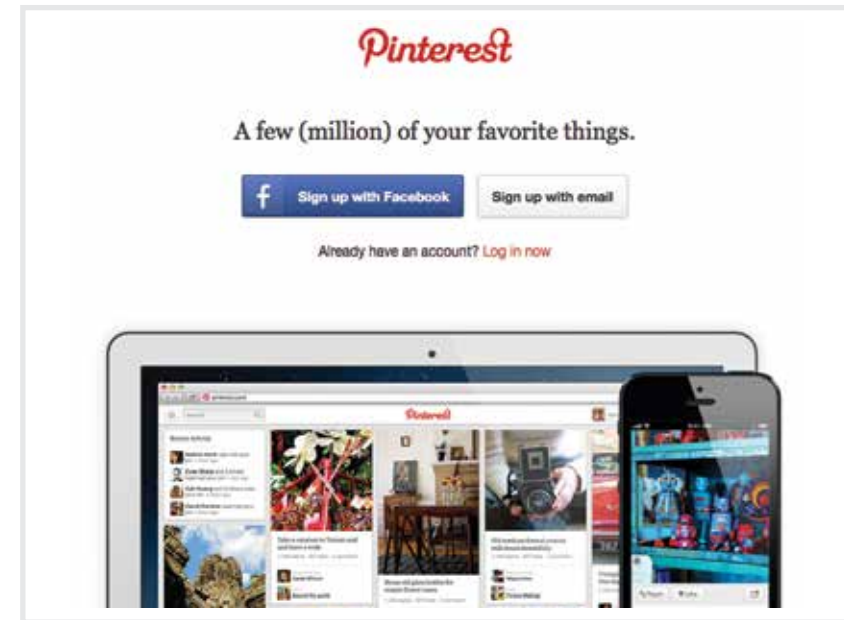


Figure 6. Pinterest allows users to share their favourite images.

14.5.2 Video sharing

Online video consumption continues to grow year on year as bandwidth gets faster and cheaper. Sharing video content is easy with social video sites such as YouTube. Anyone can upload videos captured on simple devices such as webcams and mobile phones, or on high-end professional cameras.

There are several video-sharing platforms. Some of the most popular include YouTube (www.youtube.com), Vimeo (www.vimeo.com), Instagram Video (instagram.com) and Vine (vine.co).

On YouTube, which is owned by Google, users upload 100 hours' worth of video every minute, and 4 billion hours of video are watched every month (YouTube, 2013). This makes it the premier social video-sharing site on the web. Most video consumption is based on social media – the top videos have succeeded because they have been spread virally over vast social networks – and over one billion unique users visit YouTube every month (YouTube, 2013).

YouTube offers many features to video uploaders and viewers, and is simple to use. While it is possible for unregistered users to watch most of the publicly available videos, a quick, straightforward registration process allows members to upload an unlimited number of clips, comment on and add video responses to them,

NOTE

Vine is a video-sharing tool that allows you to append six-second video clips to tweets on Twitter and Facebook.

NOTE

The most watched video in YouTube history is PSY's Gangnam Style music video, which has netted over 1.7 billion views.

and subscribe to content feeds that catch their attention and interest. Frequently enhanced functionality and clever features continually push YouTube to deliver bigger and better services to its ever-increasing user base.

YouTube and marketing

There are two aspects to marketing through YouTube: promoting video content through YouTube, and advertising next to (or during) content on YouTube.

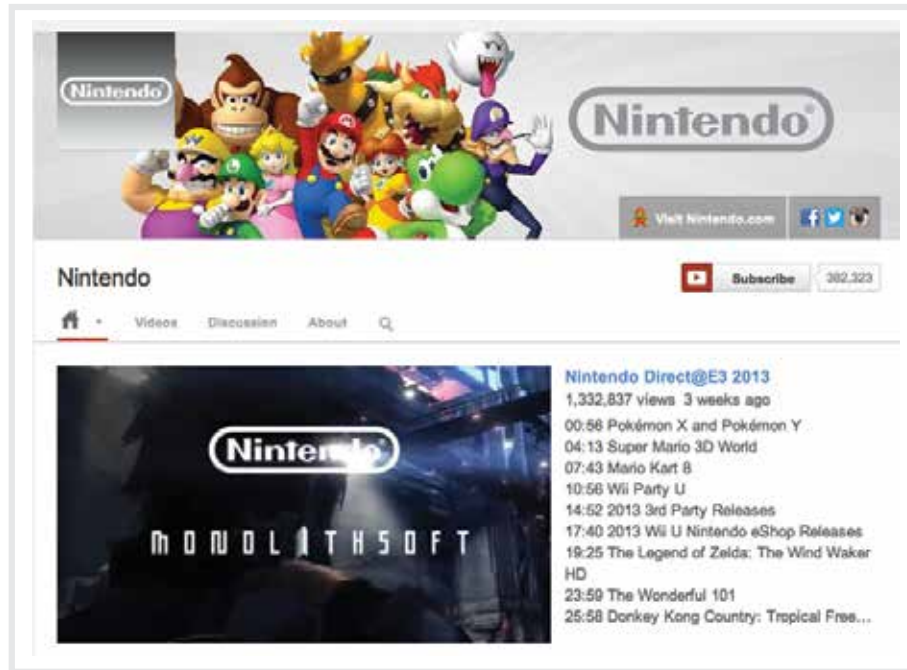


Figure 7. Content promotion through YouTube can be a powerful tool.

YouTube offers Brand Channels. Brands can sign up for and customise their own channels on YouTube, adding backgrounds, logos, playlists and additional community features. Organisations and brands can also promote their own content using YouTube's Promote Your Video feature, and can post adverts through Google AdWords.

NOTE

Read more about this in the *Video Marketing* chapter.

Using social services such as YouTube allows video creators to tap into an existing community of avid video viewers. For example, YouTube has changed the way we view video commercials. Marketers have shown that if an advert is good enough, many people will choose to watch it. Super Bowl commercials, for example, are highly anticipated each year, and the best ones receive millions of online video views. These are people who have chosen to watch this advert at a media cost of zero! Other advertisers have realised that far longer adverts can be created and uploaded. As long as the content is good, people will watch (and hopefully share). Time constraints are not the same as they are for television networks.

Online video sharing also makes it possible for conferences to generate a far greater audience than ever before. The companies that run these conferences are able to engage with a massive audience by posting videos of the conference presentations – an excellent example of content marketing. TED (www.ted.com) and Nokia's, which runs Nokia World, are excellent examples of organisations that increase interest by making their remarkable presentations available for free.

14.5.3 Blogging

A blog is a website where entries (blog posts) are typically displayed in reverse chronological order. Technorati, a blog and social media tracking engine, defines a blog as a "regularly updated journal published on the web". Blogs usually allow readers to comment on blog posts. A typical blog will feature text, images and links to other related blogs and websites.

NOTE

Read more about this in the *Content Marketing Strategy* chapter.

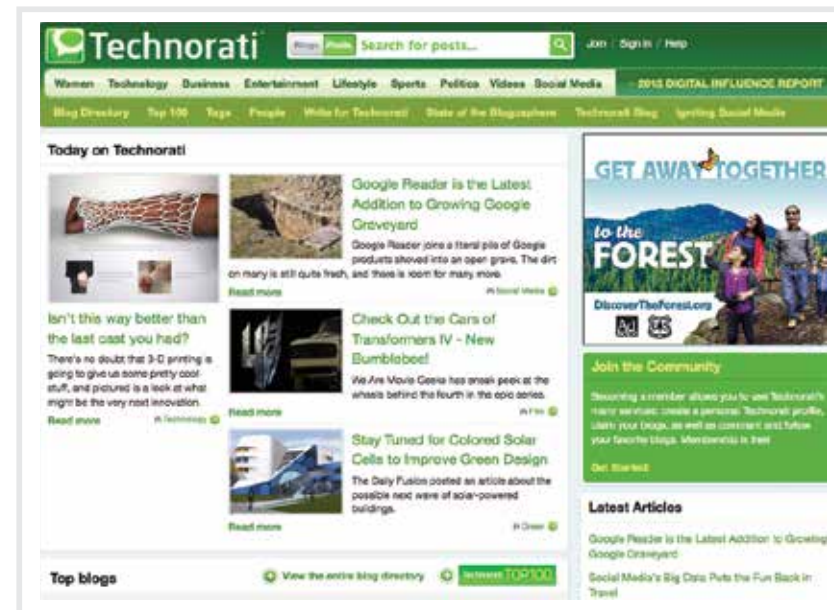


Figure 8. Technorati, a blog aggregator.

Blogs can be about anything – from personal journeys to political commentary and everything in between. They can be written by one person or by a group or company. Some are aimed at the blogger's immediate family and friends, and others rival leading newspapers in terms of reach and readership. Blogs are mostly text based, but can comprise solely of images, videos, audio or a combination of any of these.

According to Wikipedia, by 2012, there were 77 million Tumblr blogs and 56.6 million WordPress blogs worldwide – that's a lot (Wikipedia, 2013).

The basic elements of a blog post are:

- **Author:** the person who wrote the blog post.
- **Title:** the title of the blog post, which is usually used to create a unique URL, or permalink, for the blog post.
- **Tag:** the categories used to describe the blog post, and aid services such as Technorati in categorising them.
- **Comment:** the comments left by readers of the blog, usually shown below the blog post.
- **TrackBack:** a notification of other blogs linking to a post, often displayed below the blog post.

Some other elements of a blog include:

- **RSS feed:** an RSS feed allows readers to subscribe easily to the blog.
- **Categories:** blog posts can be allocated to categories.
- **Blogroll:** a collection of links to other blogs or websites frequently read or used by the blogger.
- **Archives:** previous posts remain available for visitors to search through, and are usually categorised by date.

Whether blogging as an individual or a company, there is plenty to be gained from the process. You can:

- Create an online identity.
- Create a voice for yourself or your company.
- Promote engagement with your audience.
- Build a community.

Corporate blogging

Blogs can be very successful marketing tools. They're an excellent way to communicate with staff, investors, industry members, journalists and prospective

customers. Blogging also helps to foster a community around a brand, and provides an opportunity to garner immediate feedback on developments.

Generally, the tasks that a blogger undertakes include:

- Writing posts
- Replying to comments from readers
- Monitoring other blogs within the industry
- Keeping up to date with the latest industry news
- Building relationships with other bloggers in the community
- Commenting on other blogs

It is important to outline a strategy and establish guidelines before starting a corporate blog, especially as there will most likely be a number of contributors. Transparency and honesty are important, but companies should also be aware of sensitive information being blogged. If there are 'no go' areas, they need to be clearly defined to the parties involved. While certain topics can be restricted, ultimately the bloggers should be granted the freedom to express both negative and positive points of view about the approved topics.

Positive claims are more believable if the blogger is able to express negative views as well. For example, Robert Scoble, in his popular blog www.scobleizer.com, admitted that the Firefox browser was better than Microsoft's Internet Explorer. Robert Scoble was an employee of Microsoft at the time. This honesty gave him a credible voice, and so his positive views on Microsoft are respected by the community.

Corporate blog content should be:

- Industry relevant
- Appealing to your target market
- Transparent and honest
- Personal and entertaining
- Related to what's going on in the blogosphere
- Posted regularly

NOTE

It can take a lot of time for a blog to gain momentum - don't get discouraged if your audience is small initially, and stick to your content strategy.

Blogging and SEO

Search engines value regular, fresh content, and blogging can create just that. The more you post, the more often search engines will crawl your site, looking for additional, relevant content. Basing your blog on the keyword strategy created during the SEO process can also ensure that your website ranks for those key phrases. Blogs, by their social nature, can also increase the incoming links to your website.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

Using a blog platform designed to be search engine-friendly is crucial to harnessing the SEO power of blogging. Some features of SEO-friendly blogging platforms:

- Each blog post should be assigned a unique page that can easily be accessed and indexed by the search engines (this is called a permalink).
- It should be possible to tag pages with keywords relevant to your SEO strategy.
- Each post should be able to have its own unique metadata (title, description and key phrases).
- Social sharing and bookmarking functionality should be built in.

Promoting blogs

While there may be around 200 million blogs on the web, it doesn't mean that all of these will still be up and running a year from now (Hughes, 2013). Longevity rests in the hands of the blogger, but here are some tips to raise the profile of a blog:

- **List the blog in blog directories:** while they're not as popular as search engines, many Internet users do visit them when looking for information. Examples include Blogarama (www.blogarama.com), Bloggeries (www.bloggeries.com) and BlogCatalog (www.blogcatalog.com).
- **Ping web services with updated content:** sites such as Ping-o-Matic (pingomatic.com) and Feed Shark (feedshark.brainbliss.com) offer a service whereby they ping multiple web services, blog directories and search engines to let them know that a blog has fresh content.
- **Use TrackBacks:** If a blogger writes a new post commenting on, or referring to, an entry on your blog, and both blogging tools support the TrackBack protocol, then the commenting blogger can notify your blog with a 'TrackBack ping'. The receiving blog will typically display summaries and links of all the commenting entries below the original entry. This allows for conversations spanning several blogs that readers can easily follow.

- **Participate in the blogosphere:** You can't expect anyone to engage on your blog if you're not engaging on theirs. It's all about fostering a sense of community.
- **Make use of aggregators:** Examples of aggregators include Technorati and Reddit (www.reddit.com).

Blogs as a marketing tool

Blogs are powerful because of their reach, their archives (information is seldom deleted and is thus available long after it has been posted) and the trust that other consumers place in them. For a marketer, they present opportunities to learn how others perceive your brand and to engage with the audience. Some brands get this right; some get it wrong.

We've provided some guidelines for corporate blogging, but marketers do not need to be bloggers to benefit from this tool. As with all other social media, blogs provide a snapshot of audience sentiment regarding a brand. Marketers can also listen to blog activity around competitors to gain market insights.

Although blogging is the best way to engage with bloggers, companies can also interact with bloggers by commenting on relevant posts. Demonstrating the capacity to listen to bloggers and then respond using the same medium can reap tremendous benefits with this community.

Blogging platforms that can be used to set up a blog quickly and easily include:

- WordPress (www.wordpress.com)
- Tumblr (www.tumblr.com)
- Blogger (www.blogger.com)

14.5.4 Microblogging

Microblogging is a form of blogging that allows a user to publish short text updates, usually limited to 140 characters, that can be viewed by anyone or restricted to a specific community. The most popular microblogging service is Twitter (www.twitter.com), which was launched in July 2006. These 140-character posts, called tweets, are usually short thoughts or links to interesting articles. As of June 2013, Twitter has more than 500 million members, with 400 million Tweets being written each day (Smith, 2013).

NOTE

Tumblr is a unique blogging platform that encourages very short posts, usually featuring images. It falls somewhere between a blog and a microblog.

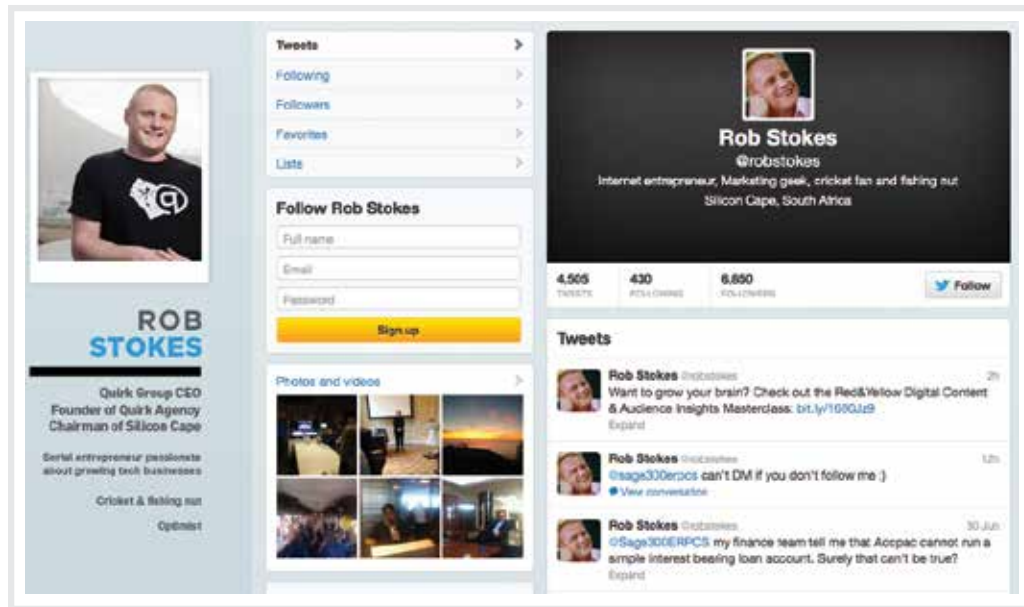


Figure 9. Profiles on Twitter can be branded to represent your organisation's identity.

Twitter has some specific jargon that it's worth knowing:

- **Tweet:** A post on made on Twitter.
- **@username:** users are denoted with @ and their chosen name (e.g. @robstokes for www.twitter.com/robstokes). Tweets can be directed to a specific user simply by typing their @username at the start of the tweet.
- **Hashtag:** users can categorise their posts by adding a word or phrased prefaced with the # symbol (for example, #DigitalMarketing). The hashtag will become a link that you can click to see other tweets that share this tag. You can also choose to follow a hashtag, meaning that you will see all public messages with that tag, whether you follow the user or not. This can be a very useful way of collating information at events such as conferences. If you're not at the event, you can still follow messages from the event by following the hashtag. For those at the event, all tagged messages can be broadcast in a shared location.
- **Trending:** if a hashtag or keyword is used very frequently in a short time, it can become a trending topic and is displayed to the left of a user's tweet stream. Events of global interest usually feature heavily, but sometimes brands can trend, too (although not always for the right reasons).
- **Retweet (RT):** retweeting means reposting somebody else's tweet to your own profile, along with their user name. The letters RT are usually added to the start of the tweet to indicate that it comes from someone else.

NOTE

Trending topics can be global, national or focused around a smaller area, like a city.

Twitter has proved immensely valuable in breaking events, where real-time information is useful and powerful. For example, Twitter users broke the news of events such as the 2013 Boston Marathon bombings.

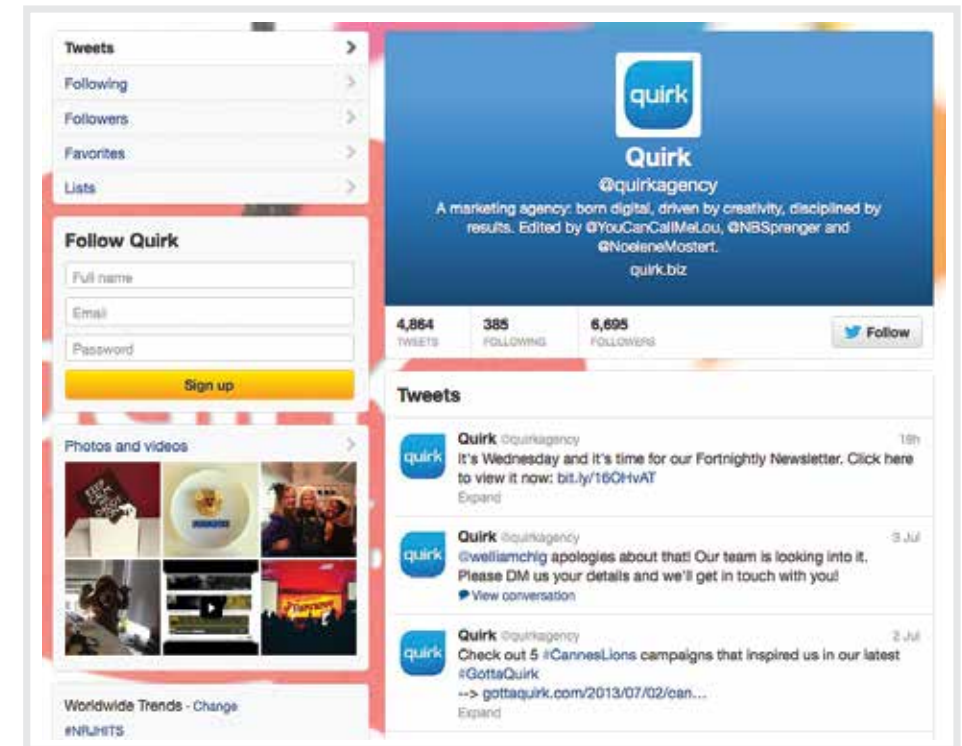


Figure 10. A Quirk Twitter feed (www.twitter.com/quirkagency).

Twitter as a marketing tool

Twitter has become a popular and important marketing tool for many organisations, brands and individuals. Many brands use it successfully for rapid customer service (for example, @comcastcares, @klm and @mwebguy).

Its immediacy allows for news to be broadcast to dedicated followers and fans first, as pop star Lady Gaga has done with single releases (@ladygaga).

Dell lists several Twitter channels (www.dell.com/twitter), many of which exclusively release offer information (@delloutlet).

Twitter also has a series of self-service advertising options, which are covered in detail in the module on online advertising. These include Promoted Tweets, Promoted Accounts and Promoted Trends.

NOTE

Read more about this in the *Online Advertising* chapter.

14.5.5 Podcasting

NOTE

Have a look at the National Public Radio podcast shows as one good example of a traditional radio broadcast embracing podcasting: http://www.npr.org/rss/podcast/podcast_directory.php

A podcast is a digital radio (or video) programme downloadable from the Internet. It is possible to subscribe to a podcast as one would to a blog. You can listen to a whole range of programmes and voices; just as blogs have allowed people to become writers without having to deal with a media channel controlled by someone else, podcasting has allowed anyone who fancies doing so to become a broadcaster. Many traditional radio shows are now also available in podcast format.

'Podcatching' software allows you to download the latest edition of any podcast you subscribe to automatically. Most people use iTunes – go to www.apple.com/itunes/store for loads more information on podcasting and a huge list of available podcasts. You can listen on your computer or transfer the file to an iPod or MP3 player. Podcasts are usually free, and the most successful ones have very high-quality content and production value.

Creating a podcast

Podcasts are usually recorded and edited using home equipment, and done for the love of it. There is specialised podcasting software available, such as Apple's Garage Band or QuickTime Pro. These packages make it quite simple to record, mix and format the audio files correctly. Just like bloggers, though, many podcasters are trying to figure out ways of making money from their podcasts and turn listeners into revenue.

Podcasts as a marketing tool

Podcasts offer an incredible opportunity for marketers. The bottom line is that you now have a way of getting content to your target markets without having to persuade a media channel to carry it or to pay huge advertising rates.

Podcasts are:

- **Targetable:** you can create highly relevant, niche content and then promote it to a specific target market.
- **Measurable:** you can see exactly how many downloads and subscribers you have.
- **Controllable:** it's your content.
- **Responsive:** set up a blog alongside your podcast and alter content according to the comments; you are actually having a conversation with your market.
- **Boundary free:** it's the Internet.
- **Relatively inexpensive:** the equipment, software and skills are readily and cheaply available, and there are few or no distribution costs.

However, the content must be:

- **Excellent quality:** like anything on the Internet, it is just as easy to unsubscribe as it is to subscribe. Quality content is what keeps listeners coming back.
- **Real and valuable:** while there is value in having product or service information embedded in a website, there is no point at all in producing an audio version of a company brochure as a regular podcast. Consumers are losing faith in the content of traditional media. Even if editorial is not actually paid for, a lot of the time it has been influenced in some way by advertisers. Although there are podcasts that carry adverts, people can fast forward straight past them, and the chance of real success lies in branded content.

This is not about advertising or even just product information. It is about coming up with ideas for real programmes that, through informing or entertaining, enhance your customers' experience of your brand.

14.6 Bookmarking and aggregating

If there are websites you visit often, or that you would like to keep as a reference to come back to, it is easy to use your browser to 'bookmark' them. This means that you store the URL so that you can locate it again easily. It also gives you a personal library of websites that you can store on your computer.

Social bookmarking sites, however, allow you to store these links online, use tags to describe them, and share these lists with other users. Some of these sites allow you to submit URLs that other users vote on, while others allow you to use the tags saved to browse through the lists and libraries that have been generated.

Websites that encourage users to submit content to bookmarking and aggregating sites use chiclets. These are buttons placed around the content that make it easier to submit and share the article.



Figure 11. Examples of chiclets.

These services allow you to see what the community of web users finds useful, interesting or humorous. You are able to find other users with similar interests to yours, and explore the websites that they have found that you might not have come across yet.

Content submitted to a social bookmarking or aggregating site can dramatically increase traffic to a website, and expose the site to many new views.

Delicious (www.delicious.com) is a social bookmarking site designed to help Internet users organise online media in a quick, easy-to-access and user-friendly format. The primary function of Delicious is to allow you to store all of your bookmarks online and then access those bookmarks from any computer anywhere in the world. Delicious is more of a community-based tool than other social bookmarking sites, as it allows others to see your bookmarks. Essentially, it lets you identify other people whose interests and concerns parallel yours and grants you access to all of their bookmarks as well.

Digg (www.digg.com) and **Reddit** (www.reddit.com) are sites where users submit content that other users can vote on. Popularity, based on votes, moves the submitted content up and down the rankings. Submitting and voting requires registration, but there are many people who visit these sites just to get an overview of content that is 'hot'.

NOTE

Some aggregators, like Reddit, also have lively discussions about the content shared. If you want to get involved on behalf of your brand, ensure you build up a respected presence in the community first.



Figure 12. *Reddit.com, a social aggregator.*

Appearing on the top of these lists generates a huge increase in traffic for the content sites, so much so that servers can crash if the leap in visitors is unexpected. Getting into the top listings is the goal of many a marketer, but any attempt to manipulate listings usually backfires and can generate plenty of community backlash.

The communities around these sites differ demographically, and this is reflected in the content. For example, Digg has been technology focused, while Reddit tends to feature more general news.

Stumbleupon (www.stumbleupon.com) allows you to explore the web through your interests, based on how other web users tag content. Users select categories of interest and bookmark URLs to those categories. You can then choose to 'stumble' through the web using the category of your choice. The service will randomly show you a website that has been submitted to that category.

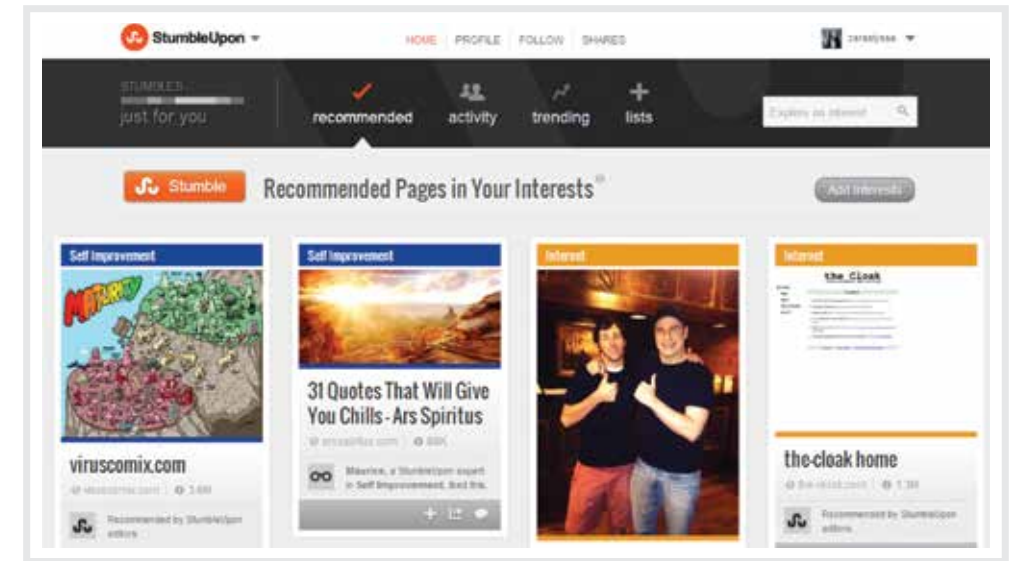


Figure 13. *Stumbleupon is another approach to a social aggregator.*

14.6.1 Bookmarking and aggregating as marketing tools

Seeing how users categorise your content will give you an idea of how your audience perceives your website and company. It may be remarkably different from what you think they see you as. Look at other websites which are tagged similarly. You may find new competitors, and possibly new ideas.

You can also use these services to share what other URLs your company finds interesting. This can be a useful resource to add to an online press room, as well as a utility that fanatics of your company would get really excited about.

To generate links and traffic, investigate the sort of content for which your target audience loves voting, and create that content. A word of warning: never do the content submission and voting yourself. It's one sure-fire way to incur the wrath of these communities.

Organic growth is the only way to go here. It may take time as you build your reputation and value among the community, but the end result can be very worthwhile.

14.7 Location and social media

Social media have also seen the introduction of location services such as Foursquare (foursquare.com) and Facebook Places (www.facebook.com/about/location). These services allow users to 'check in' at locations they visit with equipment such as mobile phones and tablets.

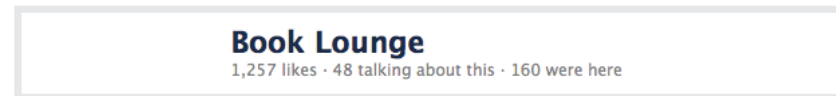


Figure 14. Users can check in at physical locations on Facebook.

By checking in, users are able to share their location with their friends and find others who are checked in as well. Depending on the tool, they can add reviews, post messages and upload photos of the locations they are checked into. Foursquare lets users become 'mayors' of locations they have visited more than anyone else.

These location services appeal to marketers for a number of reasons, since they can obtain, engage with and retain customers by leveraging their interactions with the real-world. For instance, if people see their friends checking in at certain places, they are more likely to want to go there, particularly if their friends have posted a positive review of the location.

These services also offer rewards and special deals to users who have checked in, incentivising them to return and share the location with their friends. Starbucks offers a range of location-based incentives, for example, offering all mayors of Starbucks stores a discount at any branch.

14.8 Tracking social media campaigns

NOTE

Read more about this in the *Data Analytics* chapter.

As with any digital marketing tactic, you need to be able to track and measure your campaigns in order to understand how successful they are, and what you can do to improve them.

With most social networking channels, you do not actually host your presence, which means that custom tracking is limited. There is often a strong reliance on the built-in tracking offered by the various channels, although new third-party tracking services are emerging and offering competitive and sophisticated tools (often for a fee). In some cases, it is also possible to integrate tracking to some extent if you are directing traffic to a web property that you own.

14.8.1 Facebook Insights

Facebook Insights is available to page administrators, and provides data on how people are interacting with your content and your page. This includes demographic information about the people connecting with your content (age, gender and location breakdown), which tabs and which content posts are seen and interacted with, and how many people hide your content from their news feed, and when. There is also data that shows how people got to your page.

14.8.2 YouTube Analytics

YouTube Analytics is available to all YouTube users for their videos and channels. As well as showing video views and popularity broken up by geographical territory, there is some demographic information shown as well. Discovery data shows how people got to your video.

One of the most useful reports for any video is audience attention, showing when people stop viewing a video, or rewind sections of video, and comparing this to videos of a similar kind.

NOTE

You can also see where people watched the video - did they come to the dedicated YouTube watch page, or did they view the embedded video in a website, email newsletter or social profile?

14.8.3 Twitter Analytics

Currently, Twitter Analytics is available only to Twitter advertisers, but there are a number of tools that use the Twitter API to provide analysis. HootSuite's Twitter management tools have built in analytics (www.hootsuite.com), and Twitalyzer (www.twitalyzer.com) is another tool that can provide insightful data.

Important metrics for Twitter include how many people interact with your content by clicking through on links, replying to you or retweeting messages.

14.8.4 Click tracking with URL shorteners

URL shorteners offer analytics that show how many people are clicking on links, when they are clicking, and where in the world they are. When you are sharing links on services like Twitter, you should be tracking this data. When selecting a URL shortener, consider whether or not they keep the click analytics private.

URL shortening services provide an easy way to share long links by generating a short URL that redirects to the original link. This is especially important when sharing links in messages with limited character counts, such as tweets.

There are several URL shortening services: bit.ly, goo.gl and ow.ly are three examples, and some websites have their own bespoke services, such as nyti.ms for The New York Times (which is excellent for reinforcing brand recognition).

For example, we may want to tweet a link to a blog post on GottaQuirk, Quirk's blog. The URL to a post may be:

<http://www.gottaquirk.com/2013/02/08/my-quirky-tips-for-digital-marketing/>.

That's 89 characters!

Using bit.ly, a URL shortening service, the link becomes: <http://bit.ly/153sjC6>. It's now just 19 characters long, and can be tracked.

Even better, some link shorteners allow you to customise your link, so the result could be: <http://bit.ly/QuirkyTips>, which is much easier to read and share.

14.8.5 Web analytics for social media

NOTE

Read more about this in the *Data Analytics* chapter.

Web analytics software such as Google Analytics plays a part in social media tracking. On Facebook, tracking script can be inserted in applications and tabs where content is served through an iFrame. When you are sharing links to your own site and content, campaign tracking parameters can be used to track the source of visits and report on them in your web analytics tool.

NOTE

You can easily create a tagged campaign tracking URL with Google's URL Builder: <http://support.google.com/analytics/answer/1033867?hl=en>.

For example, we may use campaign tracking before we shorten the URL, so the URL before shortening becomes: http://www.gottaquirk.com/2013/02/08/my-quirky-tips-for-digital-marketing/?utm_source=twitter&utm_medium=social_media&utm_campaign=ORM

The campaign tracking is appended on the end of the URL:

http://www.gottaquirk.com/2013/02/08/my-quirky-tips-for-digital-marketing/?utm_source=twitter&utm_medium=social_media&utm_campaign=ORM

14.9 Social media marketing: Rules of engagement

Social media implies a democratisation of information, and requires authenticity and openness from those who deliberately use it for marketing. This means that good and bad stories spread and stick around. Jeff Jarvis may have had problems with Dell way back in 2005, but you can easily find all the relevant information with a quick Google search for 'Dell hell'.

Although they are engaging publicly with a wide audience, marketers need to remember that they are communicating with individuals. While marketers should engage in the conversation, and possibly lead it, they cannot control it.

Marketing to content creators

Because they are so influential, approaching online influencers should form a part of any PR strategy.

Supply content creators with the tools and resources they need to talk easily about your product, including links to your social profiles, Twitter handles and hashtags.

Marketing to content consumers

Social media allow anyone to have a say, and the same tools that are available to individuals are available to companies. Company blogs allow a brand to build a personality and to interact with their target market. Entertainment created and spread via social media increases brand touchpoints. Using the same channels that are available to your consumer aids in understanding the consumer, and levels the plane of conversation.

When using social media to reach out to content consumers, go to where your consumers are. The media you use is dictated by your users. For example, a nightclub for students can create a Facebook Page to advertise its weekly specials, and interact with fans, while Land Rover enthusiasts may be more comfortable with a discussion forum.

With all interactions, marketing messages need to be clearly identified and labelled, with a disclaimer added if necessary. Trying to hide them as something else will only decrease your authenticity.

Marketing to content sharers

Content sharers are content consumers who also pass your message on, whether it's by chat or email, by sharing a link on a blog or by submitting your content to a bookmarking or aggregating service. They are a crucial link in the chain that passes your message around. Make it as easy as possible to share your content by using chiclets and unique and easy-to-read URLs.

Advertise on social media platforms

While marketers can use the tools of social media to convey their message, the characteristics that define a social media website are also important. Social media allows users to express themselves, and this means that demographic information can be compiled to allow for more useful and targeted advertising. This presents

many opportunities for targeting advertising, and for finding creative ways to reach an advert-fatigued demographic. It also introduces the risk of dealing with personal information – make sure you're up to speed with the relevant laws in your country.

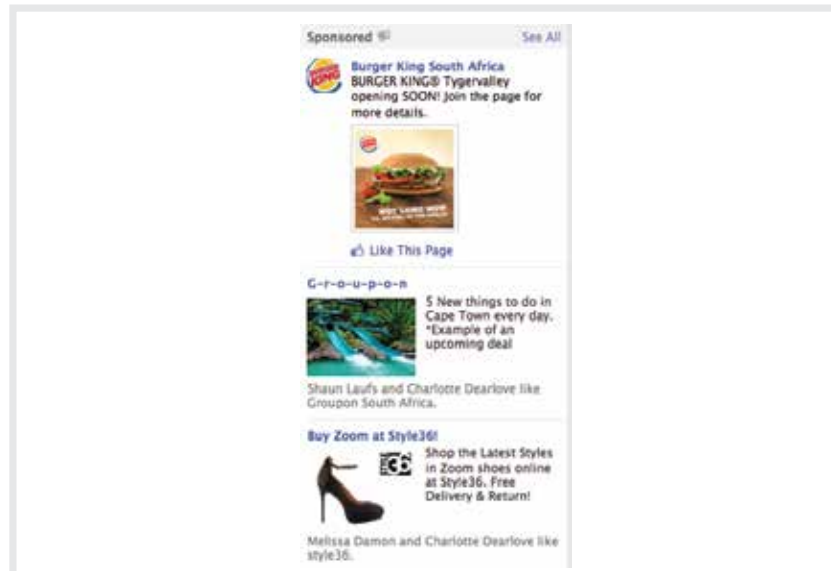


Figure 15. Facebook ads are often used as a form of targeted advertising.

14.10 Tools of the trade

As a content creator, there is a plethora of platforms for the budding social media enthusiast. Throughout the chapter, we have listed the URLs for some of the most popular services, most of which are free.

14.11 Advantages and challenges

People are finding it easier to switch off or ignore traditional advertising, particularly through traditional media environments such as TV or radio. Social media gives brands the opportunity to interact with customers through relevant and targeted communications that customers can choose to engage with on their terms. For example, a consumer may visit a branded YouTube channel as opposed to deliberately ignoring advert breaks on television.

Social media's potential to go viral is one of its greatest benefits – if users like your content, they will share it with their own communities. It also allows marketers to capitalise on the creativity of their consumers to spread their message further, often at very low cost.

NOTE

It's nearly impossible to craft content that will "go viral" – you can never know what users will pick up on or ignore. Instead, aim to make amazing content that your audience will appreciate.

Social media allows you to engage with an online community and allows you to connect your brand to the appropriate audience, creating an online community for your brand and its supporters. Social media has created a forum for brand evangelists.

The numerous interactions allow you to garner feedback from your communities, which helps drive both future business insights and innovation, as well as marketing strategies. You can learn more about your audience's likes, dislikes, behaviours and needs.

However, companies need also be aware that bad messages spread as quickly as good ones, and the connectedness that can prove so useful can also be a conduit for negative messages and brand attacks.

Social media facilitates a two-way conversation between customer and company. This necessitates that the company shifts approach from 'deploy and watch' to one of constant involvement with the audience.

This new landscape is one in which the customer really is king, and any attempt to dethrone the king can have dire consequences. Efforts to control the conversation in social media are soon found out, and can backfire horribly. Any company embarking on a social media strategy needs to be sure to monitor their reputation online regularly. It is crucial to know what is being said in order to be able to respond timeously and communicate in the social media sphere.

Finally, never forget that special rules and laws apply when you are dealing with personal information provided by users – be very careful how and where you use this data.

NOTE

Read more about this in the *Social Media Strategy* chapter.

14.12 Case study – Col'Cacchio #PriceSlice

14.12.1 One-line summary

Col'Cacchio, a popular South African pizzeria chain, created a solid social media footprint and encouraged pizza lovers to tweet for discounts.

14.12.2 The problem

Col'Cacchio wanted to create a social media strategy that would grow an engaged community and tie into their overall marketing objectives.

The challenge lay in finding a unique and innovative mechanism to drive their social media presence. The brand had already established a Facebook brand page, as well as a Twitter profile with around 2 100 followers. However, content on these channels had been largely promotional in nature, as opposed to tactical or engaging.

The key lay in leveraging their existing efforts to drive awareness, and ultimately increase ROI. They also needed to define the brand identity and tone of voice through their social media channels.

14.12.3 The solution

To achieve this, Col’Cacchio partnered with the social media team at Quirk to create the #PriceSlice Twitter campaign, a pay-with-a-tweet-inspired activation that would encourage Twitter users to eat more pizza.

The campaign had the following objectives:

- Increase the number of Twitter followers
- Increase consumer engagement
- Drive in-store sales

The campaign mechanism was simple yet effective, working on the basis of value exchange – tweets for discounts. Twitter users were prompted to tweet a message using the #PriceSlice hashtag, and the more tweets the hashtag received, the higher the in-store discount on Col’Cacchio pizzas.



Figure 16. The landing page for the Price Slice campaign.

As people tweeted, Quirk automatically captured and recorded them. Once they reached a certain level, the temperature would rise on the thermometer represented on the campaign landing page.



Figure 17. The campaign landing page with the thermometer showing a R10 discount.

The campaign also involved in-person activation through blogger engagement. Pizzas were delivered to selected bloggers, with the campaign message secretly hidden beneath the pizza slices.

14.12.4 The results

The campaign got off to a great start. After one hour, the #PriceSlice hashtag was trending in Cape Town, and within three hours both @Colcacchio and #PriceSlice were trending in South Africa:



Figure 18. A Tweet showing the brand trending on Twitter.

The results in the campaign showed the following:

- A total increase of 23% in Twitter followers through the course of the campaign, and in the days following it.
- Around 21% of the campaign website visitors returned to the site more than once, indicating that they were following the discount and were likely to visit a Col’Cacchio branch to take advantage of it.
- The campaign achieved a great deal of PR and blogger engagement through a variety of posts crafted around the campaign mechanism:



Figure 19. A blog post promoting the brand.



Figure 20. A blog post promoting the brand.

During the course of the campaign, the Quirk social media team closely monitored the campaign and noted some other interesting observations:

- The campaign seemingly drew new individuals to the Twitter platform, since a number of users created Twitter accounts simply to participate in the promotion.



Figure 21. Tweets using the #PriceSlice hashtag.

Even bloggers not targeted through the pizza delivery activation crafted posts about the promotion:



Figure 22. A blog post about the campaign.

- There was also a great deal of positive sentiment about the campaign itself, shared via Twitter and other online channels:



Figure 23. A Twitter search reveals the brand featured in Top Tweets.

Col’Cacchio and Quirk also went further to capture a range of data related to online mentions of the campaign.

Here are some key observations:

- There was an increase of 440% in @mentions of the @Colcacchio Twitter handle during the campaign, when compared to the days prior to launch.
- There was also an increase of more than 800% in the number of @Colcacchio retweets during the campaign when compared to the week prior to it.
- Over 3 000 mentions of the #PriceSlice hashtag were achieved through the course of the campaign.
- As a result of the exposure of the campaign across various channels, the campaign reached just short of three million ‘opportunities to see’, meaning that the Price Slice initiative potentially reached almost three million Internet users. For example, if a Twitter user with 2 000 followers tweeted about the campaign, then 2 000 people had ‘opportunity to see’.
- The majority of Price Slice conversation came from respected sources in the online community.

This campaign not only highlights the value of social media engagement for a brand, but also indicates how offering consumers something in return can really endear a brand to its followers. Col’Cacchio and Quirk embraced the strengths of Twitter and used the platform to build brand awareness in a positive and meaningful way.

14.13 The bigger picture

Social media can tie in nicely with any of your other online marketing tactics – a holistic digital marketing strategy is always the best strategy.

Social media is inextricably linked to content marketing strategy, since content is the foundation of any social media marketing endeavour – whether you’re creating digital copy, images, videos or other media.

Social media can have SEO benefits for a website. By using social media services, either to create or share content, websites can attract links and generate engagement, helping to enhance search engine rankings. Signing up to several social media channels can help a company to own a larger chunk of the search engine results page. Companies can also use their SEO keyword strategy to focus their social media efforts.

Social media can provide a targeted network for online advertising, allowing detailed demographic information to play a role in media planning and buying. Companies can also make use of increased consumer engagement to create interactive advertising for these mediums, such as advertising within videos and social network applications, or merely making use of increased time-on-page metrics to create more intricate advertising.

Affiliates often use the opportunities presented by social media to find new avenues for targeted traffic, resulting in revenue growth for the company being marketed this way.

Social media plays a large role in online monitoring and reputation management, viral marketing and digital PR. Social media is used to express opinion, and so is the bedrock of online reputation. Any company that wants to communicate to this connected audience needs to listen to social media.

14.14 Summary

Social media refers to the creation and sharing of content by consumers on the Internet. All Internet users – companies included – now have the opportunity to be creators as well as consumers of content.

Social media refers to the online platforms that allow users to:

- Create and engage in social networks
- Create and share content
- Bookmark and aggregate content
- Connect to physical locations and contacts
- Use other Internet users’ preferences to find content

Most social media services are free to all users and rely on advertising for revenue. Social media provides targeted demographic information to advertisers looking to direct their advertising.

14.15 Case study questions

1. Why was Twitter well suited to the Col'caccio #PriceSlice campaign?
2. How were hashtags useful for this campaign?
3. Comment on the interaction between offline and online touchpoints used in this campaign.

14.16 Chapter questions

1. Visit www.guardian.co.uk. List the ways in which this print publication is embracing social media.
2. Why is transparency so important to marketing using social media? Has this halted or accelerated the use of social media for marketing?
3. What is the difference between advertising using social media and marketing using social media? What are the benefits of social media to each, and what are the challenges?

14.17 Further reading

www.gottaquirk.com – the blog from the minds of Quirk, filled with the latest in social media and digital marketing.

www.mashable.com – a blog that covers social networking and social media.

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15

Social Media Strategy

What's inside: This chapter is an **expansion** on the previous chapter dealing with social media, the **different ways of creating** and then **engaging with a thriving community**, and how **social media has wiggled its way** into almost **every facet** of the **online world**. We discuss **guidelines when dealing with difficult customers**, and how to **map out a social media plan**. We then wrap it up with a **case study** showing how **communities and brands can come together** for the good of all involved.

15.1 Introduction

In the previous chapter, we introduced the concept of social media, and detailed some of the major social media channels and platforms. This chapter addresses how to use these spaces strategically. While the channels and platforms available may change, the foundations of a successful social media strategy won't. By planning and thinking strategically, while leaving room to be flexible and dynamic, you'll be able to make the most of what social networking has to offer.

Social media channels are communication channels that can be used to solve business, marketing and communication challenges. As more time is spent by consumers online, and that time is increasingly dominated by social media usage, organisations need to incorporate social media into their marketing strategies. The Pew Research Center's *Internet & American Life Project* shows that 67% of Internet users visit social networking sites (Center, 2013). The Nielsen and NM *Incite's Social Media Report* indicates that American computer users spend about 20% of their time online visiting social networks, while mobile users spend 30% of their time on these sites (Nielsen, 2012). This means more time is spent on social media than on any other category of sites.

In this chapter, you will learn:

- Several valuable strategic uses of social media
- The steps to creating a social media strategy
- Which documents and protocols you should have in place for social media success

15.2 Key terms and concepts

Term	Definition
Community guidelines	The rules and principle that community members must adhere to when communicating on a brand platform.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Lead	A person who has shown interest in a brand, product or service and could be converted into a customer.
Objective	A desired outcome of a digital marketing campaign.
Online reputation management (ORM)	Understanding and influencing the perception of an entity online.
Search engine optimisation (SEO)	The process of improving website rankings in search engines.

Social media dashboard	A service that allows you to centralise management of your social media properties.
Social network	In the online sense, a type of website model where individual members become part of a broader virtual community.
URL shortener	A web tool that creates a shorter version of a full URL.

15.3 Using social media to solve business challenges

Social media can be used strategically in a number of marketing and communication challenges:

- Communication and outreach
- Community management
- Support and customer service
- Reputation management
- Advertising and awareness
- Sales and lead generation
- Search engine optimisation
- Insights and research

NOTE

Not all businesses face all of these challenges - which ones are relevant to your brand?



Figure 1. Social media marketing can help with a number of business challenges.

15.3.1 Communication and outreach

Unlike other options, social media offers brands an effective two-way communication and real-time broadcast channel. This bi-directional communication is what makes social communities so exciting (and challenging). Just as consumers can communicate with each other, and send messages to businesses and brands, so businesses and brands can use this medium to communicate with and reach out to the public. Increasingly, social media is becoming a highly effective public communications tool.

NOTE

Ideally, you want to be the trusted go-to source of information about your industry.

Businesses, governments and other organisations use Twitter and Facebook to broadcast timely messages, allowing interested parties to keep informed in real-time. This is fast becoming a vital aspect of newsworthy and breaking news events such as elections, disasters and global sports. Many organisations also use social media tools to broadcast service updates.

15.3.2 Community management

Social media platforms are built around communities, and are sometimes virtual representations of real-world networks and communities. This feature of social media can be used to build and maintain a community around, or supported by, your organisation.

'Community manager' is a role that has risen to prominence as more organisations start using social media, but it has always been an important role in any community – from groups that thrive on forums to communities run on platforms such as Facebook.

Creating, building and nurturing a community means that organisations don't just participate in conversations that are happening around and about them, but also actively lead and guide those conversations. These communities are generally made up of the organisation's biggest fans: brand evangelists who feel as if they have a big stake in that organisation. This creates an environment where those fans can interact directly with the organisation, and where the organisation can send messages directly to those fans and solicit their feedback.



Figure 2. MWEB responding to customer queries on Twitter.

Building and maintaining a community is a long-term project. It starts with determining what the best platform is for that community: something that already exists (such as Facebook), or a brand new platform specifically created for it (either from scratch or using a service such as Ning – www.ning.com).

15.3.3 Support and customer service

Social media is becoming an additional customer service channel. As consumers are increasingly comfortable transacting online, there is an expectation that the businesses with which they transact will also respond to customer queries in the social space, as they would do through a call centre or email. Some customers have found that problems or questions on social media tend to be resolved more quickly, as brands are wary of having unresolved issues left out in public. For any organisation that runs a social community, customer service is often one of the channel's primary functions.

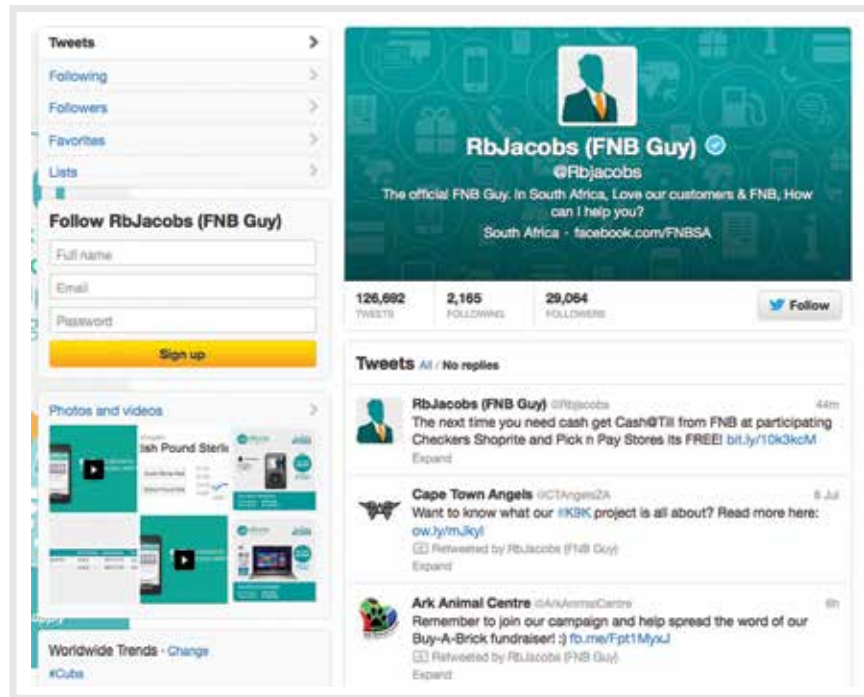


Figure 3. FNB responding to customer queries on Twitter.

Interestingly, customer service in social media channels starts to become collaborative, with customers assisting each other and, in doing so, reducing the reliance on the organisation for support. Collaborative support tools such as Get Satisfaction (www.getsfaction.com) are used to great effect. According to Get Satisfaction's website, over 70 000 communities use their service, including Microsoft and Intuit's Mint (Get Satisfaction, 2013). Even businesses that use social media channels such as Facebook for customer support can see other community members helping each other.

15.3.4 Reputation management

The need for online reputation management and monitoring is growing, and brands are now realising this. Through the combination of search and social media, all mentions of a brand or individual are only a quick search away, whether they are positive or negative. Social media are in one of the spaces where a brand or individual can easily respond to mentions, create a stir, or find ways to further their own agenda.

Brands can use social media in two ways to manage their online reputations – first, by monitoring what customers and fans are saying to identify issues proactively; and second, as a means of communicating and getting their side of the story out.

15.3.5 Advertising and awareness

Where there is an audience, there is advertising. The more time people spend in social media, the more brands want to advertise there. It's not just the time people spend on social networks that make them appealing to advertisers – it's also the rich demographic and psychographic targeting opportunities. Adverts can be targeted based on the profile information that individuals provide, either overtly or through their actions on the social network.

Most social networks offer advertising options that are accessible to both the small advertiser as well as the big spender. This is a dynamic space, as the networks experiment with different formats and models. The advertising opportunities for Facebook, Twitter, YouTube and LinkedIn are covered in full in the *Online Advertising* chapter.

NOTE

Read more about this in the *Online Advertising* chapter.

15.3.6 Sales and lead generation

Adding a social layer to a commercial transaction can create a richer experience for online consumers. These can be based overtly on social connections, or on inferred connections based on behaviour.

Levi's Friends Store (store.levi.com) is an example of the former. Visiting the website while signed in to Facebook allows you to see which of your friends like which styles. Levi's can then present this information with data that includes your friends' upcoming birthdays. This is useful feedback for you, as you can see which styles are more popular among your friends, as well as users in general. This provides insight for Levi's on which styles are more popular than others.

NOTE

You can see how it works at <http://www.youtube.com/watch?v=Ed5vJeaEuzA>.

An excellent example of the layer based on inferred connections is Amazon's collaborative filtering. If you've browsed on Amazon.com, you will no doubt have seen product information such as "People who bought this also bought that". In real time, based on consumer purchase behaviour, Amazon presents products that you are likely to have an interest in, based on people who browsed and purchased products that you like. Although you may not realise it, this is a social layer on the online shopping experience.

Social communities can also be lead generation or sales generation assets. Within Facebook, for example, applications on brand pages can allow eCommerce transactions or lead generation within the Facebook environment.

15.3.7 Search engine optimisation (SEO)

Social media plays an important role in SEO. It provides additional assets that can be optimised so that a brand 'owns' the results page for searches for their brand. A savvy SEO strategy will also make use of social media assets, links and likes for strengthening the position of other web assets in the search engine results pages.



Figure 4. Branded social media platforms appearing in Google search results.

With a little bit of planning and keyword research, a brand can use social assets effectively to own searches on their brand name. This ties back neatly to managing their online reputation, too.

15.3.8 Insight and research

Social media can be a very powerful insight and research asset, but the information needs to be judged in its proper context. When you are planning a campaign, social media can provide a rich source of data, both demographic and preference based.

You can use the information people share freely to understand more about your market, brand or product. ORM tools help you to track mentions and sentiment, giving you insight into how you are perceived. Using social network ad planners, such as Facebook or YouTube's offerings, can give you rich information about the size of your market, and things that they like. You can measure sentiment and the changing number of mentions to help you understand the impact of other campaigns. These can be offline or online campaigns.

Building your online community also gives you a group you can reach out to for information and feedback, creating an always-on online focus group. However, bear in mind that they are inherently biased just by the fact that they would join your social community.

Doing a Twitter search of branded keywords can reveal what users are saying about your brand. You could also use communities such as Flickr to see what people are sharing about their lives, without even realising. Head over to www.flickr.com and search for 'in my fridge' for a snapshot of this in action.

This social data can be very valuable, but must be treated correctly. It is qualitative and quantitative information, and is in many ways secondary research. For research purposes, it can and should be used to help form research questions for further evaluation.

15.4 Step-by-step guide to creating a social media strategy

Social media is a fast-moving channel, which means proper planning is vital to success. Effective social media strategies come from embracing the fact that social media is a two-way communication channel: organisations interacting in this space need the resources not only to push messages out, but to deal quickly with the messages coming in, too.

Planning is the foundation of success. Here is one method to approaching social media strategically.

1. Get buy-in

It's important that there is buy-in for your foray into social media. It may be seen as a free resource, but even if you are not paying for exposure, there is a time and resource investment required. A number of stakeholders will need to be aware of your social media plans, and these may be both internal and external. And, of course, you will need sign-off for any budgeting or additional resourcing requirements.

Addressing the various stakeholders will also force you to do the necessary research and planning to take the next steps.

2. Listen and understand the landscape

It's important to take a step back first. Social media is more than the social spaces you may interact with in your personal capacity. A good first step to understanding the landscape is to listen.

NOTE

Try this yourself: do a search for your favourite brand and see how many of the results are social media profiles.

NOTE

Be sure to consider the risks of *not* being on social media as well!

Some important questions to answer include:

- What conversation already exists around your brand, your industry and your competitors?
- Do they have the facts?
- Where does it take place?
- Who is doing most of the talking? What can you, as a brand, add to this conversation? Is it valuable?

Online monitoring tools such as BrandsEye (www.brandseye.com) or Radian6 (www.radian6.com) can help you with the listening part of your planning, but in the early stages you may want to start with free tools such as Google Alerts (www.google.com/alerts).

3. Analyse

Using all the data you have been gathering, analyse! Think critically about social media and your brand, as well as your brand's broader marketing, communication and business challenges. All of this should be looked at within the context of the information that you already know about your local marketing and business environment.

Your outcomes here should include:

- A list of the social channels and platforms your brand should be in. This is based on who your customers are, where they interact, and where they expect to interact with you.
- Non-official groups or communities that already exist, which may have been created by fans.
- An overview of the existing conversation (volume, frequency and sentiment), as well as any content or conversation themes that occur.
- An overview of what your competitors are doing in this space.
- A list of potential brand evangelists and influencers in your industry.

NOTE

Indicate if the sentiment around your brand is strongly positive or negative; typically, most comments will be neutral or informational.

4. Set objectives

Your objectives are the desired outcome of your social media strategy. These should be based within the context of your marketing and business challenges.

Firstly, you need to address how you will use social media for your organisation. You then need to set objectives for each of those.

To make them tangible and measurable, establish key performance indicators (KPIs) for your objectives, with benchmarks and targets where appropriate.

Determine SMART objectives:

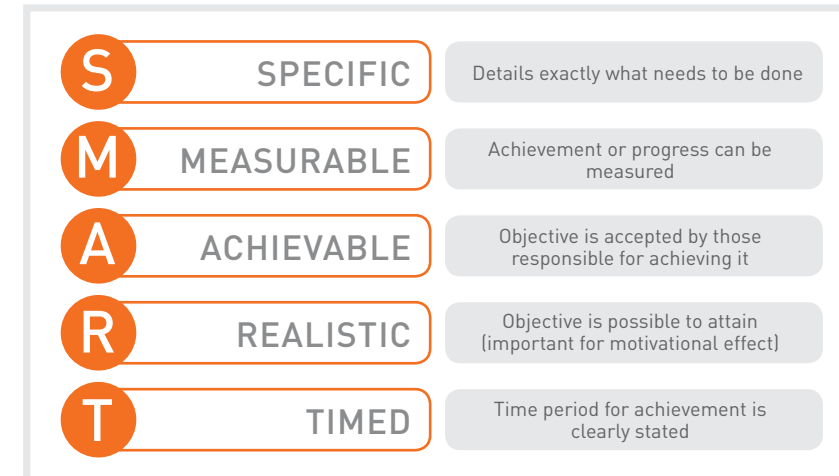


Figure 5. The various elements of a SMART objective.

For example, your objective could be to grow a community of fans around your brand in a particular country. Your KPI might therefore be fan numbers, and you could set a target of 5 000 Facebook fans over six months.

5. Create an action plan

Once you have a clear idea of what you want, you can begin compiling an action plan to get there.

This is where you need to make sure that you have created the necessary documents and processes that form the foundation of your plan.

You will need to:

- Decide on the roles and responsibilities of the project team and other stakeholders.
- Determine what social media tools you will make use of.
- Commit to a frequency and volume of activity, as well as how quickly you will respond.
- Develop a conversation plan.
- Create tone of voice guidelines, frequently asked questions, community guidelines and content plans.

6. Implement

This is the fun part! It's time to kick off your plans and put all that research and thought into action. Set up your platforms according to the guidelines they specify. Alert stakeholders that you are starting your engagement plans, and make sure you have tracking in place. Continue to monitor for mentions of your organisation, and responses to your messages. Keep to your general plan, but be prepared to adapt.

7. Track, analyse, optimise

The beautiful thing about digital marketing is that you can track every single user interaction and use this information to learn from and improve your efforts continually. You should track the success of your social media campaigns on an ongoing basis, and set milestones for your team at less frequent intervals (every couple of months or so), when you will sit down and do a more in-depth review.

There are several tools you can use for tracking social media. You will need to build a suite of tools to suit your measurement and reporting requirements.

Platform insights

Facebook, YouTube, and other social media platforms offer analytics and insights. These are a useful starting point for reporting on your social media efforts, from numbers of followers or fans, to interactions with the content you share.

Web analytics

If you are using social media channels to send traffic to your own website, you should tag the links so that you can segment that traffic in your website reports. In Google Analytics (www.google.com/analytics), you would use campaign tracking parameters.

URL shorteners

URL shortening services such as bit.ly and ow.ly offer usage data that will tell you how many people click on links you share, when they click on them, and where in the world they are from.

Online monitoring software

Online monitoring software is an important measurement investment that you will need to make. It helps you to keep track of all mentions of your brand, and to understand the sentiment and influence of those mentions. You should be tracking your reputation for trends and changes over time.

Social media dashboards

There are a number of services that make it easier for you to centralise management of your social media properties, as well as making collaborative management easier. They also integrate analytics data from a number of sources, making reporting easier.

Some services include:

- HootSuite (www.hootsuite.com)
- Spredfast (www.spredfast.com)
- CoTweet (www.cotweet.com)
- Sprout Social (www.sproutsocial.com)
- Socialbakers (www.socialbakers.com)
- Tweetstats (www.tweetstats.com)

NOTE

Some dashboards even let you schedule or respond to posts directly from the interface.

15.5 Documents and processes

Good documentation and processes are the foundations of social media success, especially as this dynamic space is likely to involve many stakeholders from across your organisation. To ensure that there is consistency across the various channels, processes and guidelines should be a part of your social media strategy, and should be created before you take any action on social media.

Start with the documentation and processes you already have in place for marketing and communication: for example, brand and tone of voice guidelines, or PR policies. Build on these to create a robust foundation that suits this spontaneous, dynamic space.

A social media checklist is a good starting point to make sure that you have everything in place. Examples of community guidelines, conversation calendars and escalation protocols are also included for you.

NOTE

Read more about this in the *Data Analytics* chapter.

NOTE

Never write down or share account passwords in these documents! Only the people working directly on the channels should know them.

Item
Account logins: <ul style="list-style-type: none"> • Facebook • Twitter • YouTube • Blog
Item
Community Guidelines available online and linked to where appropriate
Social Media strategy and content strategy
Roles and responsibilities
Risks and escalation plan
Brand voice guidelines
Social media guidelines for agencies and employees
Monitoring and listening plan
Reporting: tracking and insights

Figure 6. The social media checklist.

15.5.1 Community guidelines

As well as a privacy policy and terms and conditions, it's a good idea to establish community guidelines for the communities you manage, especially when the community is on behalf of a brand. Community guidelines help to set the tone for the community, and are useful to refer to should community members behave in a way that is undesirable. They indicate what will, and will not, be tolerated, such as hate speech, profanity, discrimination and other inappropriate content. Of course, community guidelines don't prevent such behaviour, but are useful to fall back on should you need to remove comments or community members.

Guidelines should be friendly, with the tone in keeping with your community or brand. You can use the information here as a starting point, but customise it for your situation.

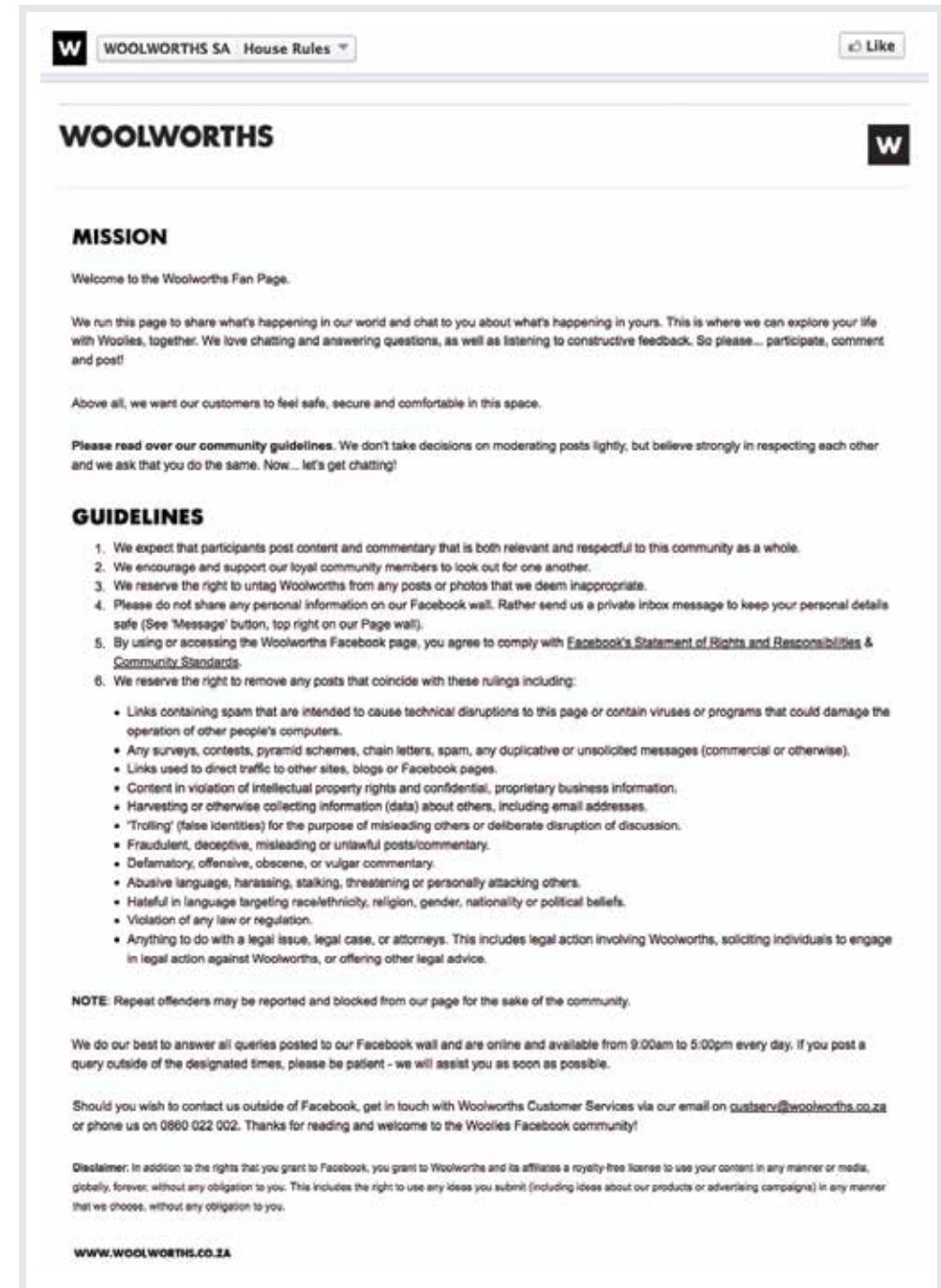


Figure 7. Community guidelines on the Woolworths Facebook Page.

15.5.2 Content plan

Content plans help you to plan your community conversations. More than that, they are also useful, centralised planning documents that ensure that various teams are all aware of each other's efforts, and that communications are integrated. For any kind of content and communication strategy, content plans are invaluable.

NOTE

As you learnt in the *Content Marketing Strategy* chapter, reaching social audiences requires you to create content that truly resonates with them. Successful social content must be interesting, relevant, shareable and remarkable. It is especially useful to plan and create social content around your content pillars, since this gives you a solid structure and starting point to follow.

To start creating a conversation calendar, you should plot everything that is relevant to your community. This could include public events, dates and anniversaries, or events and communications already planned by your organisation.

You should also use your conversation calendar for reporting. Keeping track of interactions and responses to your planned posts will help you to determine what kind of posts your community responds to, what days are best for posting, and what frequency works best for your community.

Planning the conversation helps to keep momentum, especially in the early days of building a community. However, it should not replace spontaneity – this is a conversation, after all!

NOTE

Date	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Theme							
Facebook							
Twitter							

Figure 8. The conversation calendar.

15.5.3 Communication and escalation protocol

An established communication and escalation protocol helps to ensure that all parties are aware of procedures for handling social messages, and can respond as appropriate. This is especially important for large organisations where several people might be interacting in social media on behalf of a brand, or where several departments or agencies have a stake in the organisation's social media presence.

Read more about this in the *Content Marketing Strategy* chapter.

There are many fields that can go into a conversation calendar (such as suggested copy, links, and more). Take the basic calendar on the right and adapt it to your needs and preferences.

A communication and escalation protocol should include:

- Anticipated messages, frequently asked questions and appropriate, standard responses (for both positive and negative situations).
- Guidelines for determining the sentiment and risk of messages, which includes a flagging system for comments that need more senior attention.
- The crisis management process to follow if a brand crisis erupts on social media.
- An escalation plan for messages that need signoff or further consideration.
- Contact details of relevant stakeholders.
- Guidelines for responding, including response rate, standard messages, brand voice and tone.

NOTE

Make sure that all stakeholders understand their roles, and appreciate that social media interactions often need to be handled quickly.

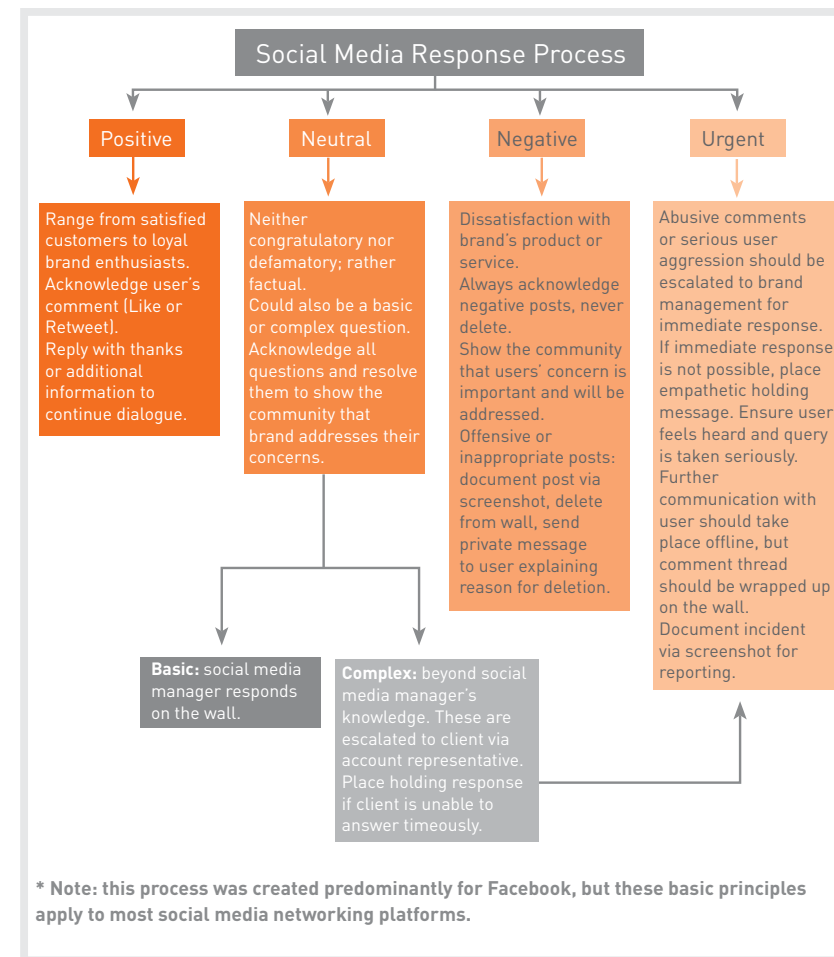


Figure 9. A decision flowchart is a useful way of disseminating information.

15.6 Dealing with opportunities and threats

The use of social media has equipped consumers with a voice and a platform, and the ability to amplify their views and truly inform their decision making. The connected nature of the Internet makes these views easy to share, and the accessibility of social media tools makes it easy for other consumers to find these views, and respond and build on them. All of this contributes to the perception of the brand.

The best way to show that you are listening to customer comments, complaints and questions online is the same as with a normal conversation. Comment when it's appropriate, listen with interest, be polite, be respectful, and add value wherever possible. Brands should become active participants in the conversation.

Brands that are successful in communicating with their audiences are constantly on the lookout for opportunities to propel their brand forward, and are keeping their eyes peeled for risks that may threaten their reputation. In both situations, the power sits in how the brand responds. This response can range from a direct engagement to a full new marketing campaign. Ultimately it depends on how powerful the opportunity or risk is.

15.6.1 When to talk (and when not to)

When everything being said is nice

A fantastic position to be in is that every possible mention is overwhelmingly positive. Well done. However, that does not mean that there is nothing to do. During this time, the brand must do everything in its power to drive high volumes of conversation.

Stakeholders are being positive about the brand because their expectations are being exceeded. Unfortunately, expectations change. Brands need to stay on their toes and constantly be on the lookout for new and innovative ways to meet and develop their brand promise.

When everything being said is neutral

If this is the case, it sounds as if the company is very boring – not a good way to get attention. As Seth Godin puts it, "Safe is risky" (Godin, 2010). If a company is playing it so safe that no one can be bothered to send either praise or criticism its way, it's in danger of being forgotten. The next step is no one talking about the company at all.

When negative things are being said

Negative statements should be understood as broken brand promises. There is underperformance on expectation, and it must be dealt with as a matter of high priority. During this period, brands need to be very careful not to stir up any more conversation than is absolutely necessary. That said, it's certainly not all doom and gloom. If the conversation is broadly negative, it is normally because there is some underlying problem, and this information provides the business with focus to resolve it.

Complaints are from stakeholders who have had dealings with a company which hasn't met their expectations. By complaining, this customer is, often unwittingly, giving the company the opportunity to make things right, and is probably indicating where the company can improve. Usually, the skilled customer service department of a company should deal with these. They should also share insights with the business strategy department so that the underlying problems can be prioritised and resolved.

If a complaint is online, the resolution should be there as well, although you can try to have it taken offline first. Even though the customer service will likely take place either over email or by phone, posting a personalised comment in a blog post, for example, will demonstrate to the community that the company listens, responds, and serves the critical objective of actually resolving the underlying issues.

Criticism need not necessarily come from customers, but it is important to be aware of it. If a criticism involves false information, it should be corrected. And if the criticism is true, then it should be dealt with as such.

15.6.2 Responding

Responding involves recognising that consumers hold the upper hand in the relationship. They are better trusted, there are more of them and, in most cases, the barriers to exit from a brand are relatively low.

Customers dictate the channels of communication. An organisation needs to go to the consumer, not the other way around. Ignoring this will result in the business losing customers because they not willing to truly engage. This is why it is so important to research your audience and tailor your strategy to them – not vice versa.

When responding, be transparent, be honest, and treat the person as you would like to be treated. At all times, remember that you are engaged in conversation, not a dictation.

NOTE

In fact, resolving a serious complaint to the customer's satisfaction can gain you a loyal brand advocate – someone who has first-hand experience that your brand cares and goes the extra mile.

NOTE

Read more about this in the *Market Research* chapter.

15.7 Step-by-step guide for recovering from an online brand attack

These rules to recovery provide a practical approach for brands facing an online threat.

15.7.1 Step 1: Be prepared

No brand is immune from an online brand attack. The best brands have strategies in place to identify a reputation crisis immediately and respond to it quickly enough to stop the negative word of mouth spreading.

Keep your brand in front of consumers by engaging in the conversation. This can be done by making use of blogs, communicating with customers, and being as open and honest as possible. Engaging in, and leading, the conversation allows you to build an authentic voice. If a crisis hits, you will be well placed to respond in a way that is authentic.

15.7.2 Step 2: Act immediately!

The easiest way to solve most brand attacks is to respond quickly. A brand that shows it is listening and does indeed care will go far when it comes to ensuring a solid online reputation. Acknowledge what has been said and react accordingly.

15.7.3 Step 3: If what they're saying is false...

If the attack on your brand is factually incorrect, send the person evidence that they are wrong, and in a friendly tone, ask them to remove or retract the entry, and offer to keep them informed of future news. If the person doesn't react or respond, add a comment.

15.7.4 Step 4: If what they're saying is true...

If the mention is negative but true, send your side of the story and try as hard as you can to take the conversation offline. If appropriate, apologise and offer to make amends.

NOTE

Cultivating a loyal community of fans can help immensely when clearing up false information. You will look much more credible if your fans back up your statements.

15.7.5 Step 5: Keep the negative pages out of the search engines

Keeping more people from reading negative things about your brand is imperative. Knock them off the first page of the results with basic SEO and some social media pages, such as Facebook, Twitter or blog posts. Keep adding pages and links until you've forced the offending pages out of sight.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

15.8 Social media risks and challenges

Any social media strategy should account for the risks and challenges of interacting in this environment, and should incorporate a protocol for dealing with these risks. Mistakes on the web can take a long time to recover from.

Some of the common risks and challenges are listed below.

No one cares. Especially when building a community from scratch, it can be difficult in the beginning to get the traction you want. This is why understanding the landscape in the context of your organisation's market is so important. Make sure you are interacting in the spaces where your customers are, and where they are happy to hear from you.

The social media space is used by unhappy customers (who are free to post detractive comments). Even if the only feedback you are getting is negative, this is good feedback! Now you have an opportunity to do something about it.

It requires ongoing attention and monitoring. Social media channels may be free, but there is still a time and resource investment required to make your strategy a success. Understand what your objectives are for using social media, and budget the time required to meet those.

It can be difficult to measure the impact of the campaign. Social media can be difficult to measure, but that does not mean your campaigns are not successful. Don't expect to find a solution (or success) overnight. Start with measuring things that can be measured easily, and watch for case studies in this space that will help you to turn your social media investment into revenue for your organisation.

15.9 Case study – Super Bowl Social Media Command Center

15.9.1 One-line summary

The organisers behind the Super Bowl, the most watched sporting series in the world, used social media to monitor and manage massive crowds.

15.9.2 The problem

Social media monitoring isn't just for brands and products – it can be just as useful during live events. Take the Super Bowl, for example. It's one of the most watched sporting events in the world, with over 100 million viewers. It's also a massive real-world event, where 150 000 people crowd the city of Indianapolis for the day.

15.9.3 The solution

In order to monitor and manage these massive crowds, organisers came upon the idea of creating a 'Social Media Command Center', and hired a team from communications company Raidious to handle it. Working out of an office in the city centre, a big team of strategists, data analysts and volunteers monitored social media conversations for two weeks before and during the event. Their motto was 'monitor, moderate, publish'.

The command centre monitored around 300 keywords from Facebook, Foursquare, YouTube and a series of Twitter hashtags. They responded, gathered data, and kept track of sentiment and congestion, reaching about 49 000 people in the area. Through retweets and shares, they reached around 1 million impressions a day. In total, that translates to about \$3.2 million in marketing value.

The team focused on responding to fans who needed advice or help while attending the event. For example, they sent out links to parking information to drivers stuck without a spot.



Figure 10. A Tweet giving Super Bowl fans information on parking.

They sent tweets about handy downloads for watching the game and also posted useful information about things such as open Wi-Fi networks in the stadium.

The team managed to identify and respond to several safety issues even before the official organisers knew about them. They were also ready with a crisis communication plan in case of a large-scale emergency.

15.9.4 The results

The overall campaign was a huge success. Sentiment about the Super Bowl had a positive to negative ratio of 3 : 1 (It's unusual to see one higher than 2 : 1). The Command Center also achieved a daily average of 3 500 retweets and 2 500 Twitter favourites or Facebook Likes. They even managed to beat the National Football League's Klout score!

The potential benefits of a system like this are great – from better public safety and smoother crowd management, to branding and social engagement.

Simply monitoring what people say can provide an incredible amount of useful, immediate feedback – something that's essential in this fast-paced digital world (Laird, 2012).

15.10 Summary

Social media can be used strategically in a number of marketing and communication challenges:

- Community management
- Support and customer service
- Reputation management
- Search engine optimisation
- Communication and outreach
- Advertising and awareness
- Sales and lead generation
- Insights and research

Creating a social media strategy requires careful planning, and a strong foundation that will allow you to be dynamic.

The steps to creating a social media strategy include:

- Get buy-in
- Understand the landscape
- Analyse
- Set objectives
- Create an action plan
- Implement
- Track, analyse, optimise!



Figure 11. The steps involved in a social media strategy.

Social media is a vital strategic consideration for any brand. Whether your organisation is actively involved in social media or not, your consumers are. If nothing else, this means that there is market data available to you, if you just take a little time to find it.

Organisations that make a considered move in the social media sphere will find it both challenging and rewarding. The rapid feedback loop can often change preconceptions or even marketing plans, as the voice of the customer is amplified through social media. However, the collaboration with passionate customer stakeholders is extremely rewarding.

15.11 Case study questions

1. How would you describe the link between social media strategy and the social customer?
2. How would you advise the strategists in the Social Media Command Center to respond to a very unhappy fan?
3. How would you define a keyword in this context?

15.12 Chapter questions

1. What are some of the pitfalls of engaging difficult customers on social media platforms?
2. What skills do you think are important for a great community manager to have?
3. Should all brands be active in social media spaces? What brands have less to gain from trying to create an online community?

15.13 Further reading

www.socialmediaexaminer.com – Social Media Examiner offers practical advice, tips and strategies for engaging on social media.

socialmediatoday.com – Social Media Today offers news, insights and analysis of social media trends.

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16

Email Marketing

What's inside: An **introduction** to email marketing, and **the key terms and concepts** you need for this chapter. We look at **email strategy and planning** as key to its success, and how to **grow a database** and explore the **creative execution** of emails. We also look at how and when to deploy emails and how **email analytics** can be used to track and measure campaigns. Finally we suggest some **handy tools of the trade** and provide a useful **case study** along with a view of **the bigger picture** and a **summary** of the chapter.

16.1 Introduction

At its core, email marketing is a tool for customer relationship management (CRM). Used effectively, this extension of permission-based marketing can deliver one of the highest returns on investment (ROI) of any digital marketing activity.

Simply put, email marketing is a form of direct marketing that uses electronic means to deliver commercial messages to an audience. It is one of the oldest and yet most powerful of all digital marketing tactics. The power comes from the fact that it is:

- Extremely cost effective due to a low cost per contact
- Highly targeted
- Customisable on a mass scale
- Completely measurable

Furthermore, email marketing's main strength is that it takes advantage of a customer's most prolific touchpoint with the Internet – their inbox. Many of the principles covered in this chapter can be applied to any type of permission marketing – especially SMS communication via mobile phones.

Email marketing is a tool for building relationships with both existing and potential customers. It should maximise the retention and value of these customers, which should ultimately lead to a greater return on investment. Email is being used not only to drive retention, but also for acquisition, mobile strategies, and even social media.

NOTE

Some people consider email marketing to be old fashioned - but it can be one of the most powerful tools in your digital arsenal.

In this chapter, you will learn:

- The basics of email strategy
- How to structure and design an effective marketing email
- How to plan and execute a successful email marketing campaign
- Techniques for measuring and optimising your email campaigns

16.2 Key terms and concepts

Term	Definition
Alt Text	This refers to the 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a user what an image is about and displaying the text in instances where the image is unable to load. Also called Alt Tag.
Business to Business (B2B)	When businesses sell products/services to other businesses and not to consumers.
Business to Consumers (B2C)	When businesses sell products/services to consumers.
Call to action (CTA)	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today, and so on).
Clickthrough Rate	The total clicks on a link divided by the number of times that link was shown, expressed as a percentage.
Customer relationship management (CRM)	A strategy for managing a company's interactions with clients and potential clients. It often makes use of technology to automate the sales, marketing, customer service and technical processes of an organisation.
Database	In email marketing, the database is the list of prospects to which emails are sent. It also contains additional information pertinent to the prospects.
Domain name system (DNS)	DNS converts a domain name into an IP address.
DomainKeys	An email authentication system designed to verify the DNS domain of an email sender and the message integrity.
Double opt-in	The act of getting subscribers to confirm their initial subscription via a follow-up email asking them to validate their address and hence opt-in again.
Email service provider (ESP)	A service that helps you design and send emails.
Hard bounce	The failed delivery of email communication due to an undeviating reason like a non-existent address.
House list	An email database a company generates itself without purchasing or renting names.
HyperText Markup Language (HTML)	Code used to structure the information and features within a web page. As an example, HTML emails usually contain graphics and can be interactive.

Internet Protocol (IP) Address	An exclusive number that is used to represent every single computer in a network.
Internet Service Provider (ISP)	The company providing you access to the Internet, for example, MWEB, AOL, Yahoo.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Open rate	The percentage of emails determined as opened out of the total number of emails sent.
Opt-in	Giving permission for emails to be sent to you.
Opt-out	Also known as unsubscribe. The act of removing oneself from a list or lists so that specified information is no longer received via email.
Return on investment (ROI)	The ratio of profit to cost.
Sender ID	A method used by major ISPs to confirm that an email does originate from the domain that it claims to have been sent from.
Simple Mail Transfer Protocol (SMTP)	A protocol for sending messages from one server to another.
Soft bounce	The failed delivery of an email due to a deviating reason like an overloaded email inbox or a server failure.
Spam	Email sent to someone who has not requested or given authorisation to receive it – EVIL!
Sender policy framework (SPF)	An extension of SMTP that stops email spammers from forging the 'From' fields in an email.
Text	Text emails or plain text emails do not contain graphics or any kind of markup.
Unique forwarders	This refers to the number of individuals who forwarded a specific email on.
White list	A list of accepted email addresses that an ISP, a subscriber or other email service provider allows to deliver messages regardless of spam filter settings.

16.3 Email strategy and planning

The first part of any email campaign should involve planning for the goals you need to achieve. Email marketing can be used as a tool to help you achieve your business and website goals. As with all tactics, email marketing should be considered in line with your overall business, marketing and digital strategy.

As discussed in the chapters on analytics and conversion optimisation, you will decide on the key performance indicators (KPIs) for your campaign. KPIs are the metrics that indicate how well you are performing.

Promotional emails will usually have an immediate goal:

- Users make a purchase
- Users download some content
- Users request further information



Figure 1. An example of a promotional email from Park Regis hotels.

Newsletters tend to focus on longer-term goals and are usually geared at creating and retaining a long-term relationship with the reader – so your KPIs are more important here. Useful KPIs include:

- Open rate
- Clickthrough rate
- Number of emails forwarded
- ROI
- Number of social shares
- Database growth
- Conversion rate (activity on your site generated by the email)
- Delivery or bounce rate

NOTE

Read more about this in the *Data Analytics* and *Conversion Optimisation* chapters.

NOTE

A third type of email is called a “transactional email”. These are sent in response to customer interactions with the brand (for example, a confirmation email sent after a completed purchase).

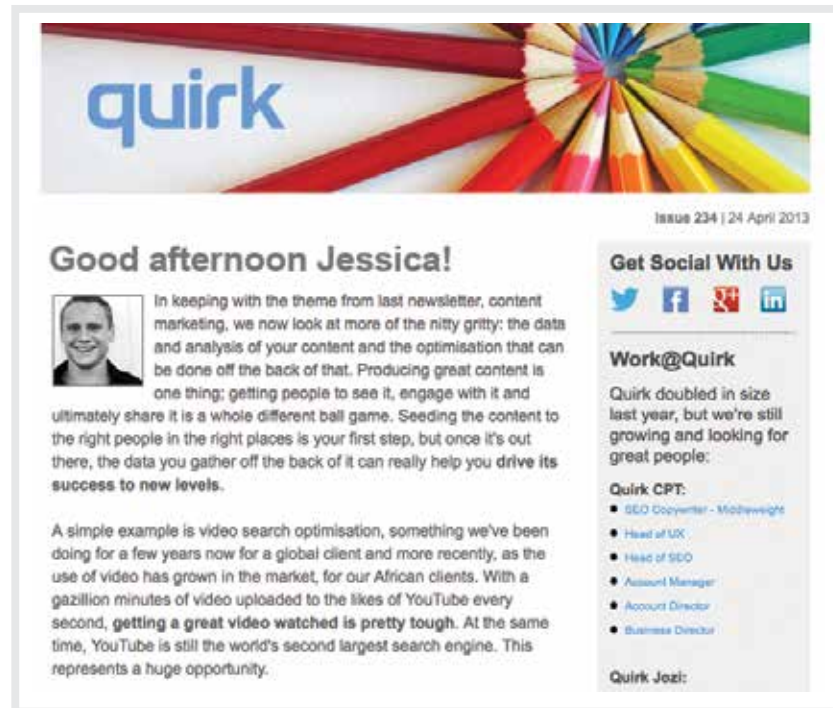


Figure 2. The Quirk digital marketing newsletter provides useful content and insights.

Know your audience! They will dictate which interactions you should measure.

16.3.1 Email service providers

NOTE

We've listed some ESPs in the tools of the trade section at the end of this module.

An email service provider (ESP) is a partner who can help manage your email design and send. For bigger organisations, it often makes sense to purchase your own software and server, or partner with an ESP. This is especially true if you are sending more than 50 emails at a time. Most ESPs are do-it-yourself services that do not manage or strategise your campaign, but will give you the tools you need to manage it yourself.

There are some important questions to ask when choosing an email service provider.

- How easy is it to use? This is important if you are managing the campaigns yourself.
- Can you upload and migrate the contact list? It's important that you own your lists.
- Is the process self-service or managed?
- How does the reporting work?

- What is their deliverability like?
- Are they endorsed by email and deliverability authorities, such as ReturnPath or Trust-e?
- Do they adhere to best practices for direct marketing?
- How is the data stored, processed and secured? Who owns it?

16.3.2 Email for mobile phones

With the adoption rate of smartphones increasing, more and more people are viewing their emails on mobile phones. As of January 2013, 42% of emails opened are accessed on mobile devices (Litmus, 2013).

This is a challenge. The mobile screen is obviously much smaller than a desktop screen, and so the way an email is displayed differs vastly as well. Not only that, but different mobile devices also make use of different mobile operating systems, meaning that each one has different standards and default settings and, as such, also renders emails in a unique way.

To make things even more difficult, very few people view an email on only one device. They switch from their smartphone to their laptop to their tablet and back to their mobile phone during the course of a day. This means that, although sending two versions of your email is an option (one for mobile, one for desktops), it's probably not the best solution. You want an email that displays well across as many different clients and operating systems as possible. One way to achieve this is through responsive email design.

NOTE

Read more about this in the Web Development and Design chapter.

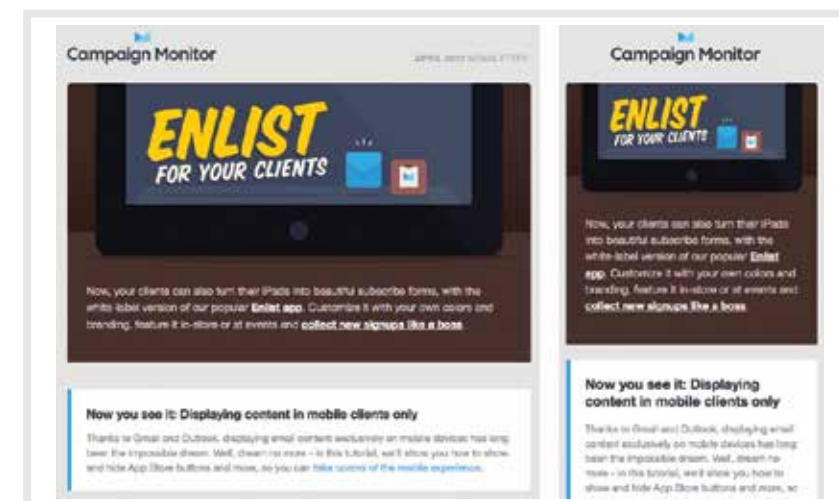


Figure 3. The Campaign Monitor email template responds to the screen size of the device on which it is viewed.

Some smartphones do render HTML emails and even auto-fit them to fit the mobile screen, but not all handsets do this.

The most important things to keep in mind when designing an email for mobile are:

- The screen is a lot smaller
- Inputs can vary, with touchscreens being the most common

So, your content must be easy to skim, with clear Calls to Action.

NOTE

Here are some common best practices to follow when designing your emails, to ensure optimal rendering on mobile devices:

- Generally, most emails are designed to be 600px wide to display well in an email preview pane – and this scales well on typical mobile screen sizes. On a 320px screen, an email can be zoomed out to 50% and display perfectly; similarly, on a 480px screen it can display at 75%.
- Host your email newsletters online and link to them from your preheader. That way, anyone who opens your email on a mobile – even those whose mobile phones display emails in plain text – can click straight through to an HTML version of your newsletter.
- Design your email in a grid system. This means your content needs to be laid out in vertically and horizontally aligned blocks, with gaps in between. Doing this will make it easier for various operating systems and email clients to scale your email down to fit a mobile screen. This is not a guarantee that the email will display properly in mobile, but it should solve the problem for most mobile devices (such as iPhone and BlackBerry) which auto-fit HTML emails.
- Make sure that you include alt text for your images! Your email needs to convey its message with or without images.
- Mobile devices that don't automatically scale your email down will display the content on the left of your email first. Make sure that your most important content is placed here.
- Button links need to be at least 44px to render well on mobile phones.

Something important to remember: **design for touch**.

Many mobile devices have touchscreens. This means that, instead of clicking on your links with a mouse, users will be tapping at your links with their fingers. If your links are placed too close together, it will be difficult for users to click on one link without accidentally also tapping the other. To make the user experience easier, make sure your links are placed in a 30–45px area, with a margin of at least 15px around them. By spacing links like this, it will be easier for touchscreen users to follow through on your Call to Action.

16.3.3 Rules and regulations

There are a number of laws across the world to protect people from unsolicited emails and stop businesses from abusing this communication channel. While they vary in severity according to the country (and we recommend that you do some research into your local legislation), it's important to acknowledge one very important rule. If someone requests to be unsubscribed from your communication, you have to meet their request or face penalties in many jurisdictions.

16.4 Step-by-step process

16.4.1 Growing a database

Running a successful email campaign requires a business to have a genuine opt-in database. This database – the list of subscribers who have agreed to allow a company to send them emails with marketing messages – is the most valuable asset of an email campaign.

Permission must be explicitly given by all people to whom emails are sent. Companies that abuse this can put their reputation in jeopardy, and in many countries, legal action can be taken against companies that send unsolicited bulk email – also known as spam.

It is important to track the permissions that are generated for each user – a time stamp is a key part of the data capture and opt-in process and helps to protect you against spam complaints and potential legal action.

Spam is unsolicited bulk email – it means that the recipient has not given permission to be sent that email. It is said to account for 72.1% of all email (Lab, 2013).

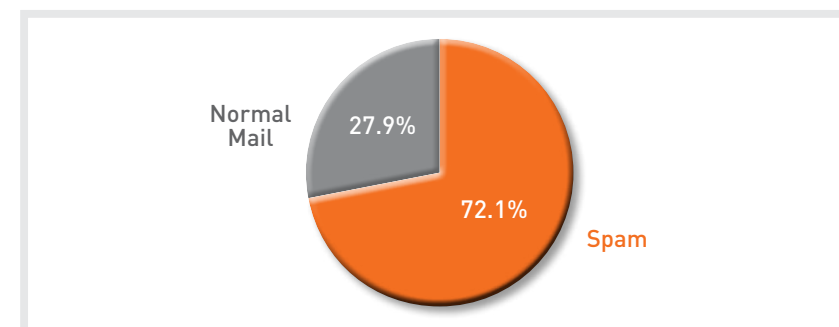


Figure 4. Almost three quarters of all email is spam.

Growing this database, while keeping it targeted, is a key factor in any email campaign.

The database need have only one entry – the prospect’s email – but the following should also be considered:

- Name, surname and title
- Date permission granted
- Source of permission
- Gender
- Country
- Telephone number, preferably mobile
- Date of birth
- Frequency (how often they’d like to hear from you)

Fields such as name, surname and title should be separated in your database. You should also gather date of birth as opposed to a prospect’s age – it ensures that your database can stay up to date.

However, don’t be tempted to ask for more information than required. The more information a marketer can gather, the better he or she can customise marketing messages. However, the more information a prospect is required to give, the less likely they are to sign up. Further information can be requested over time.

NOTE

As always, the best long-term strategy for growing your database is to create valuable, shareable content that people want to read.

There are a myriad of ways to attract prospects to opt in to a database. An email sign-up form on a company website is vital. Visitors to a website have already expressed an interest in a company by clicking through – this is an opportunity to develop that interest further. Following the same principle, any other properties where newsletter sign-up can be promoted should be taken advantage of. Consider a sign-up form on your company blog, email signatures, Facebook page, and mobi site, or perhaps mention it during presentations you deliver. And don’t forget other offline marketing channels that you’re already using, such as flyers, posters or in-store displays.

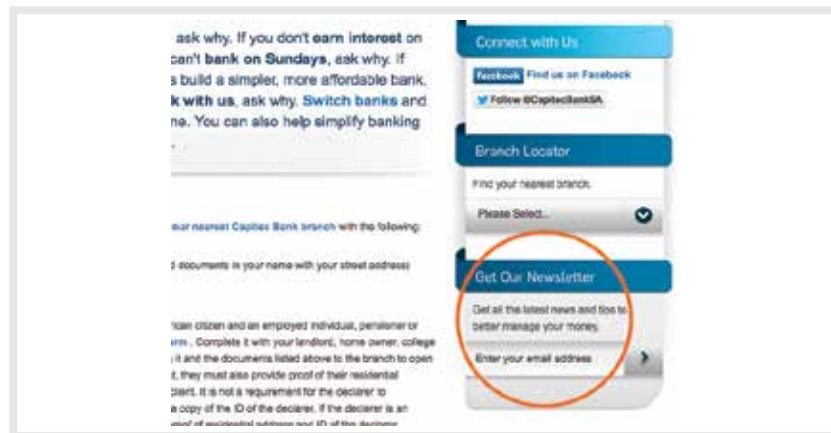


Figure 5. An email newsletter sign-up Call to Action.

Here are some best practice tips for sign-up forms:

- Put the sign-up form where it can be seen – above the fold and on every page.
- State your anti-spam stance explicitly, and be clear that you value subscribers’ privacy.
- Clearly state what the subscriber’s information will be used for.
- Use a clear Call to Action.
- Tell subscribers what they will get, and how often they will get it. Include a benefit statement.
- Ensure the email address is correct by checking the syntax.
- Test to see what works best!

Every interaction can be used to ask permission to send emails.

- Offer something valuable, and ask if they would sign up to your newsletter at the same time (for example, white paper, gift voucher, music track).
- Add a subscribe box to the checkout process of your retail site.
- Use interactions at trade shows to ask for email addresses.
- Ask for email addresses in store.
- Call out your email campaign on your social networks, and link through to your subscription form.

16.4.2 Designing an email

Emails should be created and viewed as HTML for desktop and most mobile devices. Simpler phones require basic text emails.

Text emails are the small, plain ones – text only, as the name suggests. If you use a Windows operating system, and you open Notepad and type there, you will be creating a text file. As these are text only, the copy really counts here.

HTML emails are the emails with more complex design. These emails can contain images, different fonts and hyperlinks. It’s probably what you’ve had in mind throughout this chapter when we referred to email marketing.

Given that HTML emails are likely to take longer to download and use up more bandwidth, you should give your subscribers the choice of how they would like to view your email – in plain text or HTML.

NOTE

Refer to the images of the full newsletter later in this chapter to see how these elements look in context.

Parts of an email**Sender information**

This includes the 'to', 'from' and 'reply to' fields. These are opportunities to build a relationship through creating a perception of familiarity. In other words, the reader needs to perceive that the newsletter is somewhat unique and sent personally by the publisher. Using a personalised company email address (for example, trevor@company.com) for the 'reply' field creates familiarity and builds trust with the reader. The 'from' address should also include the organisation's name. A meaningless 'from' address that the reader cannot identify serves only to confuse the origin of the newsletter.

Subject line

The subject line may be the most important part of an email! Subject lines help the reader to identify the email and entice them to open it. The subject line is also scrutinised by spam filters, and so you should avoid using characters, for example, '#2\$%^&^^%###' or '!!!!'. Consistent subject lines, using the name of the company and the newsletter edition, can build familiarity and help readers to sort their inbox. Subject lines should also reflect the content of the email. As with everything online, testing different subject lines will lead marketers to the formula that works for them.

NOTE

You could also try personalising the subject line with the recipient's name or location to make your email stand out.



Figure 6. Sender information and a subject line on an email.

Preheader

The preheader is a line or two of text displayed above your email header. Most commonly, it's the line of text that will redirect you to 'View online'. With more and more people viewing emails on mobile phones, the preheader is also the ideal space in which to redirect to the mobile version of your email. Where possible, try including your Call to Action in the preheader. This could be difficult, given the limited space – but it does ensure that every recipient (even those who don't necessarily open the email, but who view only the preheader within the preview pane or inbox) will still be exposed to it.

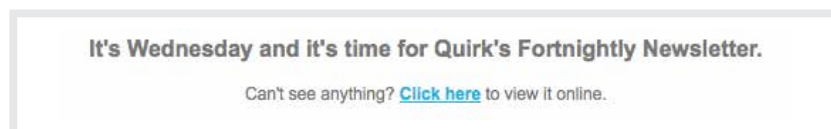


Figure 7. An email preheader.

Header

The header is the colourful banner or image that is included in many emails. This often contains the logo, which is important for branding, as well as a CTA or image to catch the recipient's attention. Not every email will have a header, but these do provide added impact.



Figure 8. An email header.

Personalised greeting

With a database that has the capability to store readers' names, it is possible to personalise the greeting of the email. "Hi, Kim Morgan" can elicit far better responses than "Dear Valued Customer", but it is possible to create a greeting with personality without personalising it. Occasionally, the subject line can be personalised as well to boost responses.

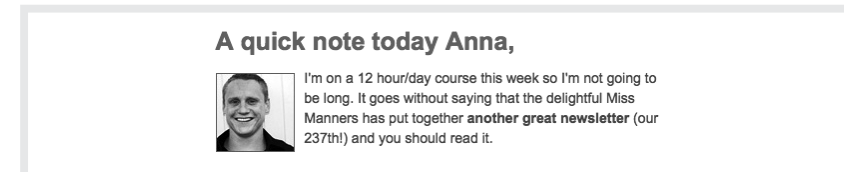


Figure 9. A personalised email greeting.

Body

This is where the content of the email goes. Don't be tempted to use too many images; they can increase the size of the email, and obscure text when images do not load. Be sure that text is not on the image, but instead can be read without an image being loaded. The structure must allow readers to scan and navigate the email easily. Short paragraphs, emphasis through bolding and colours, as well as sectioning information with bullets and borders, all contribute to a well-structured email.

Footer

A standard footer for emails helps to build consistency, and is the customary place to keep the contact details of the company sending the email. At the very least, this should include the name, physical address and contact email of the company. It can also include the privacy policy of the sender. One way to grow the email list is to add a 'forward to a friend' link in the footer. The most important part of the

footer is a clear unsubscribe link. Some ESPs enable you to place social media sharing buttons and links in the footer, allowing subscribers to share your email on their social networks.

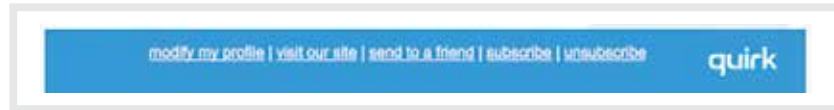


Figure 10. An email footer with an unsubscribe link.

Unsubscribe link

In many countries, it is mandatory to have an unsubscribe link on all commercial emails. In best practice terms, you should also include a link for managing subscription preferences – this lets the receiver decide exactly which emails they receive from you, rather than opting them out from all of your email marketing.

Working with templates

An email template is a predesigned structure you can use for each email you send – you just need to slot content into the appropriate sections. Some email service providers offer ready-made templates for you to use. As with website templates, paid-for email templates come with some benefits and disadvantages. While they are often cheaper than commissioning a custom template, they can be inflexible and generic, meaning that they will not uniquely represent your brand. If you are choosing a template to buy, consider picking the plainest one, so that you can adapt it to your brand as needed.

A custom-designed email template will allow you to plan your own content structure and ensure it displays well across many email readers and devices.

When having your template designed, it's important to test it with a number of email readers, browsers and mobile devices so that you can ensure that it displays correctly. Given that many people choose to look at an email in their preview pane, this can become more challenging.

Design considerations

How an email looks is integral to how well it is received by your database. Design also refers to how it is built, which can impact on whether the email is delivered and on how likely users are to interact with it. Some design considerations are included below. A few of these are a little more technical, so make sure that your email partner has these covered for you.

The look and feel

Studies have found that users read or scan emails following an F-shape (Nielsen, 2006). So, plan your important information to follow this flow.



Figure 11. Online, people tend to read in an F-shape. (Source: Nielsen, 2006)

Cluttered inboxes and busy subscribers mean an email that's lengthy and difficult to get through probably won't be read. Help your subscribers by structuring your email content into segments, making use of borders or colour blocks to accentuate and divide content. It's important to balance image and text in your emails. Make a point of placing images next to the relevant text.

General design guidelines

HTML and CSS design principles differ for web and email. Here are a few things to keep in mind when designing your email:

- Don't make use of external or embedded style sheets and avoid unnecessary embedded rows and columns.
- Make use of table nesting as far as possible, as this is generally considered to render the best results with difficult email clients. Email designers tend to make use of tables to design their email layout, using inline styles within these tables.
- Set a fixed width for your email by specifying the width and spacing of each cell rather than the entire table. When these specifics are not declared, email clients tend to render the email according to their own defaults and can break the design.
- If you are using a block background colour, be sure to include a 100% width table to cover the entire email.
- Keep fonts in your email design larger than 9px. Anything below that becomes difficult to view in some email clients. Also bear in mind that, while coloured text (or light-on-dark text) may look visually impressive, it can be difficult to read an entire email like this and may strain your subscribers' eyes. Rather limit such visual tricks to smaller sections of your email, or to emails that contain less written content.
- Make use of inline CSS – some email clients strip the CSS from the head and body of the email.
- Test your emails in a variety of email clients before you send.

NOTE

Read more about this in the *User Experience Design* chapter.

NOTE

Read more about this in the *Web Development and Design* chapter.

NOTE

Naturally, your email design should echo your overall corporate identity and personality.

Designing for the preview pane

Many email users use desktop clients to manage their email. Given the number of emails people receive on a daily basis, many do not open emails but prefer to view them in their preview panes. This has added another challenge for designers who want to ensure that their emails display properly.

Images and layout should consider the preview pane and be tested for rendering. Preview panes can be vertical or horizontal.

Tips for designing for the preview pane:

- There is no set width, and we reiterate that testing is the way to go. A width of 600px works best for preview pane display.
- Preview panes favour the top left-hand side of an email. While each preview pane may vary according to client or user settings, the most commonly favoured preview pane dimensions cover the area in the top 300–500px of your email (Hamilton, 2012). Given the width of 600 pixels, you're then (generally speaking) looking at the top 600px x 300px of your email as being most likely to be displayed in a preview pane.
- Ensure that plain, email-friendly fonts are used toward the top of your email in order to ensure that the first text encountered is properly displayed.
- Consider carefully what images you display in the top section of your email, and test display accordingly.
- Placing your logo prominently in the top left of your email can ensure optimal brand recognition and exposure.
- Try to include your Call to Action in the area displayed in the preview pane. That way, even if subscribers choose not to read your email, they'll still see your primary message.
- Some successful email templates use the area likely to be seen in the preview pane to provide a table of contents for the email. Users know what they can look forward to when opening the email.

Email and images

Avoid using images to convey important content. Make sure that there is alt text for all images used in the email. This ensures that the message of the image will still be communicated even if the image itself is not seen. Remember, many email clients are set by default not to display images. Your email should make sense whether or not the user enables images.

Tips for using images in email design:

- In the past, background images did not render well in emails, but this is changing. A block background colour tends to display well across most email clients.
- When including images in your HTML, be sure to declare the height and width for each image to ensure consistent rendering across most email clients.

Emails that make sense without images, and render correctly across all platforms, are more likely to persuade a reader to load the images (and open the email), as well as click through to the website.

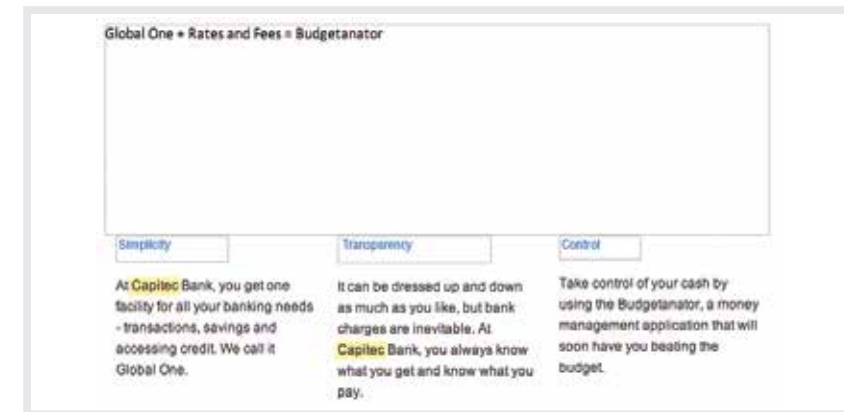


Figure 12. Good use of clear image alt tags in an email newsletter.

The Call to Action

Email design should support the Calls to Action. In order for your campaign to be effective, your goals and KPIs should be supported by the email layout and design. Calls to Action can be hyperlinked text (also called text links), or can be images which look like buttons. Don't forget though, that if images are blocked, your buttons will be blocked too.

Generally, both text links and CTA buttons are effective for generating clickthroughs. While you should use buttons for links that support your CTA (for example, 'make a booking', 'check availability'), your email shouldn't be littered with them, and hyperlinks should be used for additional links. The best thing to do is test them to see what kinds of CTAs perform best for you.

The copy of the CTA is exceptionally important: a well-crafted and enticingly written CTA makes a big difference to the performance of your campaign. Again, test variations to determine what drives the highest clickthrough and conversion rates on your campaigns.

NOTE

The images you use in the email should support the overall message, rather than convey it directly. If the image doesn't appear, the message should still be clear.

Testing

The design should be tested to ensure that it renders clearly in as many clients as possible. Make sure that images line up, that copy is clear and that all the links work.

16.4.3 Creating content

Email content that is relevant and valuable to readers is vital to ensuring the success of an email marketing campaign. Valuable content is informative and should address the problems and needs of readers. It is important to realise that the reader determines the value of the content, not the publisher. Newsletters can offer:

- Humour
- Research
- Information
- Promotions
- Exclusive content

NOTE

Determining the content of your email is an important element of your overall brand content strategy.

Read more about this in the *Content Marketing Strategy* chapter.

Any copy written for your brand should follow a pre-determined brand voice guide. Consistency is important and will dictate how your customers trust and build a relationship with your brand.

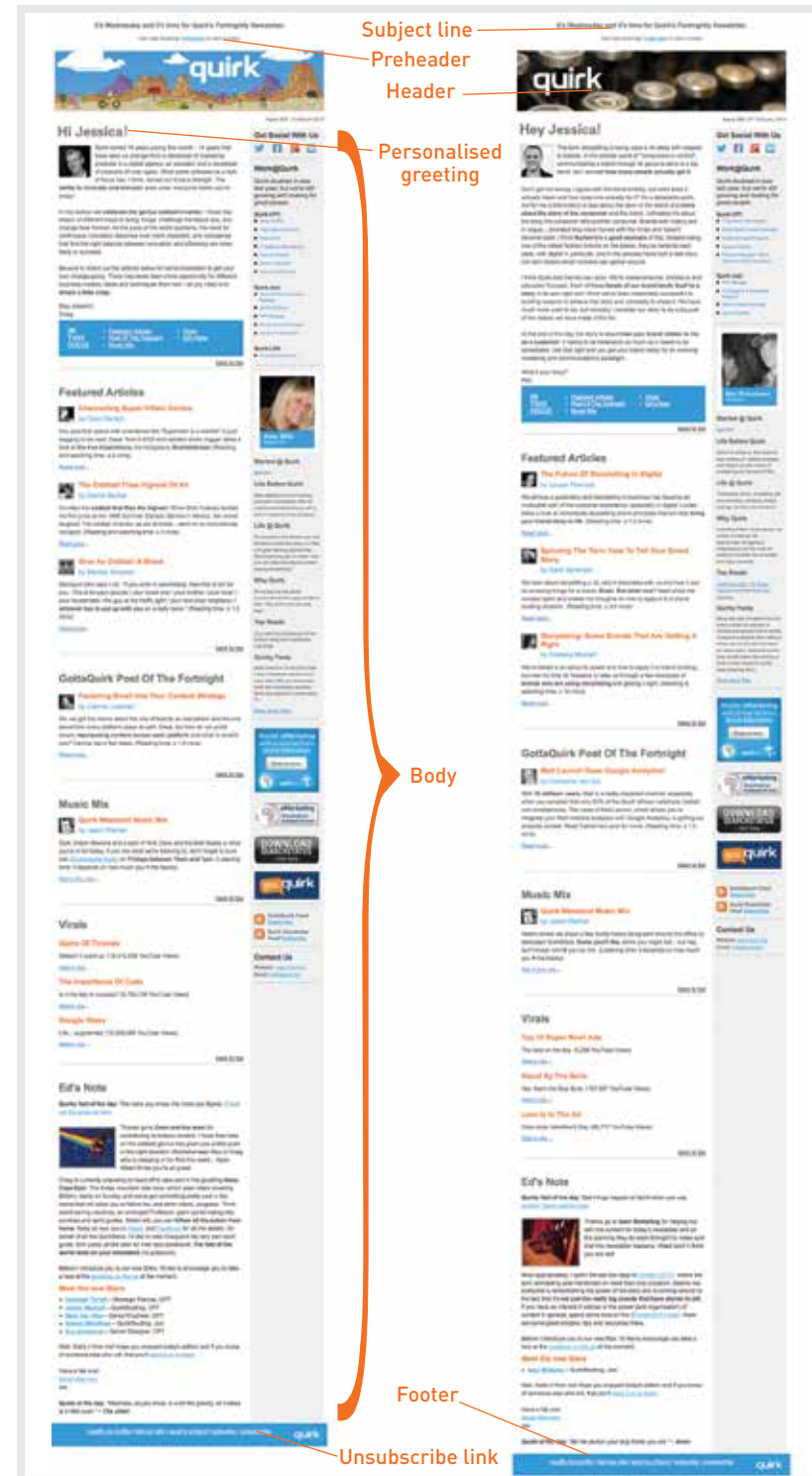
The principles of writing good online copy apply. You should start with the most important information first, and make sure that your language is scannable (meaning that it makes use of the appropriate formatting, such as bolding and bulleted lists).

NOTE

It may be helpful to review the *Writing for Digital* chapter at this stage, but there are two elements that are important to highlight with respect to writing for email marketing.

1. The first is **in-email links**. It's important to consider that any links you include in your email copy will lead readers away from your email. You'll want to keep these to a minimum, and include a link only when it is a Call to Action, a legal requirement or a service feature.
2. The second element is the all-important **subject line**. Many users decide whether or not to open an email based on their first point of contact – the subject line.

For an email newsletter, it's useful to put together a recurring content structure. The example shown here depicts a consistent content structure with repeating elements.



NOTE

Note how the same elements recur every month, creating consistency and delivering on reader expectations.

Figure 13. Two editions of a newsletter, showing a similar structure.

If your newsletter contains a lot of content, it is advisable to include enticing snippets with a link to the full article displayed elsewhere, such as in your company blog. Sending out too much long content in your newsletter can be daunting for time-starved readers, and they may not make it all the way through your newsletter. However, if your newsletter consists of only one article, it may help to publish it in full.



Figure 14. An article snippet in an email newsletter.

16.4.4 Segmenting your database

The technology of email marketing allows for mass customisation – it is one-to-one marketing on a macro scale. Even simple personalisation can see improved results.

Customisation covers everything from using the recipient's name, to sending the correct email version to their device, to sophisticated measurement of a recipient's preferences and tailoring content to suit them.

NOTE

Segmenting a database can allow for customisation across demographics or purchase history. For example, you may choose to divide your database according to gender or age. A political campaign may benefit from targeting messages to different demographics. A pet store may find it useful to segment their mailing list according to the different kinds of pets their customers own. In this way, it is possible to send mailers that are slightly different and tweaked to different target groups.

16.4.5 Deploying

By creating valuable content, establishing the correct frequency and testing the email for display and deliverability, an email marketer should be able to ensure an excellent delivery rate. Consistency in deploying newsletters also aids in fostering trust and fulfilling expectations.

Other options include segmenting by location, user behaviour on site or position in the sales funnel (for example, potential or existing customers).

When should you send emails? Common sense tells you not on Monday morning or Friday afternoon, but this varies by audience. Testing will guide you. Generally speaking, the best days of the week to send emails are between Tuesday and Thursday.

Email reputation

Email reputation is a score given to you depending on how well your emails are regarded by Internet Service Providers (ISPs) and your subscribers. If the sender's score falls within the ISP's thresholds, a sender's messages will be delivered. If not, the sender's emails may arrive in the bulk or spam folder, be quarantined, or be bounced back to the sender.

How it works: There are various authentication systems that can impact your reputation score. One of these is the Domain Keys Identified Mail (DKIM) and Domain Name System (DNS). DKIM associates domain names with individual email addresses, ensuring that each organisation has to take responsibility for emails sent that are associated with their domain. Basically, DKIM signs out any outbound emails. The DKIM signature is added to the email header and includes an encrypted code. The receiving mail server will then take that DKIM signature and verify it with the DNS system to find the matching DKIM public key. Once it has this key, it can use it to unlock the encrypted code – if the code hasn't been changed, the email hasn't been tampered with, which means it can be authenticated and passed into the receiving mail server.

Becoming an effective email marketer requires constant list cleansing and hygiene. In fact, most lists shrink by 30% each year as a result of subscribers changing email addresses. Build a preference centre and send out an email once a year asking subscribers to update their details. Make sure you are diligent about maintaining a current opt-in list to achieve maximum deliverability via reputation.

Tips to help your reputation score:

- ISPs offer various authentication standards such as Sender ID, Sender policy framework (SPF), and DomainKeys. Quirk highly recommends the use of these standards.
- Remember that a huge but inaccurate and outdated database is far less useful to an email marketer than a tightly maintained, smaller database. Strive to boost your database, but don't forget to clean as you go.
- Ensure that email broadcast rates are not too high.
- Respond to complaints and unsubscribe requests – if someone requests to be unsubscribed, do so. If you don't, there's a good chance you'll face stiff penalties.
- Educate users about white lists.

An email's reputation score can be checked at www.senderscore.org.

NOTE

The success of your email marketing relies on people explicitly indicating that they want to hear from you - don't break your customer's trust.

If the recipient has given permission to be sent marketing messages by email, then it is not spam. Users give permission when they tick a box that says: "Yes, please send me offers from your company by email". The email address can be provided to another company only if the user ticks a box that says: "Yes, please send me offers by email from third parties selected by you".

Permission must be explicitly given to the company. Trying to gain permission in a sneaky way is illegal and should never be done.

An email's spam score can be checked at spamassassin.apache.org.

16.4.6 Measuring

As with all things digital marketing, tracking, analysing and optimising are key to growth and success. Email tracking systems produce statistics in a user-friendly manner.

Key measurables for understanding the performance of email campaigns include:

- **Number of emails delivered.**
- **Number of bounces** (this should be separated into hard bounces and soft bounces).
- **Number of unique emails opened:** an email can be delivered, but not opened.
- **Unsubscribes:** significant or consistent loss in subscribers is a key indication you are not meeting the needs of your subscribers.
- **Pass-on rate:** a high pass-on rate (forwards) indicates that your customers value the content enough to share it constantly with others. Putting an easy 'forward to a friend' link in every email can increase this. You'll want to measure this link specifically. Adding a sign-up link to forwarded emails will organically grow the opt-in list.
- **Clickthrough rates and conversion:** These measure the effectiveness of an email via the links placed in the content. When a reader clicks through to a web page, these can be easily measured as a percentage against the number of delivered, opened or sent emails. It reveals which content or promotion was the most enticing for the reader.

Some metrics are more useful than others. A good example of this is the open rate. Emails are tracked using an image that gets downloaded, but many email desktop clients block the downloading of images. This means that people may be reading a text-only version of your email.

What you should be interested in is what activity takes place based on an email. So you'll need to track leads or actions. You can do this through link tagging (appending tracking parameters to a URL in your newsletter). These parameters are then identified by the Google Analytics of your website, registering that the user has come to the site through your email. Google Analytics will then take the information in the tag and store it in a cookie, from which it can track the user's interactions with the site after they arrived at the landing page.

Here is a link to the Quirk website as it may appear in a Quirk email campaign:

[http://www.quirk.biz/?utm_source=dec01&utm_medium=email&utm_campaign=digital marketing2013](http://www.quirk.biz/?utm_source=dec01&utm_medium=email&utm_campaign=digital%20marketing2013)

The tracking parameters are:

[?utm_source=dec01&utm_medium=email&utm_campaign=digital marketing2013](http://www.quirk.biz/?utm_source=dec01&utm_medium=email&utm_campaign=digital%20marketing2013)

These can then be used to report on traffic from that email using Google Analytics.

Generic email benchmarks can be used as a guide to see how well your campaigns are performing, but the best way to monitor performance is to benchmark your own campaign.

Smaller lists tend to have a higher open rate, but this is probably because they're more targeted. The overall average open rate is 11.2%, while the overall clickthrough rate is 1.6%. Overall rates are quite low because far too many ignorant or lazy email marketers bring down the average. It's best to look at the average open rate for your industry, rather than the overall rates. You can do this by checking the Email Stat Centre website (EmailStatCenter, n.d.).

Once the reports have been generated, it is time to work out what the numbers are revealing, and then use this information to improve the next email sent out.

16.4.7 Testing

In order to make sure that your email marketing efforts are continually improving, it's important to test your campaigns.

The most common form of email testing is to conduct an A/B split test. This is a test that involves sending one version of your newsletter to a specified percentage

NOTE

Read more about this in the *Conversion Optimisation* chapter.

of your database, while sending a modified version to the remainder of your database. Some factors to test include:

- Open rates across different subject lines and delivery times.
- Optimal number of links in an email for clickthrough rates and conversions.
- Different copy styles and copy length.
- The effect of video on delivery rates, open rates and conversions.
- Balance of text and image ratio.

By monitoring the results of each send, you can determine which version yielded the desired results. You can, for instance, test variations of your subject line to determine which is more effective in persuading subscribers to open your email.

NOTE

Also test your personalisation efforts: for example, does including the recipient's name make a difference? Do you get higher clickthroughs if the content is adapted to the recipient's location?

Examples of what to test:

- Subject lines
- Send times
- Best day to send
- Layout
- Text vs. button links
- Database segmentation
- Call to Action

Testing and monitoring your send statistics go hand in hand. It's important to analyse your results after sending to ensure you're implementing the most effective strategies for your database.

16.5 Tools of the trade

There are many good ESPs available.

MailChimp (www.mailchimp.com) is one example of an email service provider that can manage the email send for you from start to finish. It provides tracking, support, subscriber list management and email templates.

More advanced ESPs that offer a range of message and campaign management facilities, as well as broader data management and delivery value, include ExactTarget (www.exacttarget.com), Silverpop (www.silverpop.com) and Responsys (www.responsys.com).

All emails need to be tested for email client compatibility as well as for any potential spam problems.

For email client compatibility, as well as mobile rendering, you can test your email at: www.pivotalveracity.com/email-marketing-solution/email-rendering.html

An email's spam score can be checked at: spamassassin.apache.org

An email's reputation score can be checked at: www.senderscore.org

Quirk's fortnightly digital marketing newsletter is a good example of best-practice email marketing (and you may learn about other digital marketing disciplines too!): <http://www.quirk.biz/resources/newsletterarchive.g>

Once an email has been sent, results need to be analysed to pinpoint areas for growth for the next campaign. Use your ESP's built-in analytics feature and correlate this with your Google Analytics data.

16.6 Advantages and challenges

Permission-based email marketing can give the highest return on investment of any marketing activities. Technology allows mass customisation, allowing personalisation across a large list of subscribers.

When used to foster relationships with a customer base, email marketing can go a long way to increasing the lifetime value of that customer.

Email marketing is highly measurable, and databases are able to be easily and thoroughly segmented.

However, with the increasing numbers of companies and individuals using email marketing, many consumers are email fatigued. It requires ingenuity, focus and dedication to maintain an email database and consistently deliver useful quality emails that will be read.

It does not take much for email to be marked as spam, and it can be difficult to recover from being branded as a spammer by the ISPs.

16.7 Case study – Zando

16.7.1 One-line summary

Zando achieves a 78% open rate by implementing email marketing best practices.

16.7.2 The problem

Zando is a South African online fashion store that sells a wide range of clothes, shoes and accessories around the country. In an effort to increase their database of customers, Zando considered running an email-based marketing campaign.

Zando approached Digital Fire, a digital marketing agency, to assist them with their email campaign. Zando wanted to create brand awareness, target new customers, grow their existing email database with quality leads, and increase traffic to their website in an effort to boost sales. Ideal new customers who fitted into their target market would need to be high-earning female South African urbanites (Digital Fire, 2012).

16.7.3 The solution

To meet these business objectives, Digital Fire created an email campaign with an enticing Call to Action at its core. Readers were offered the chance for them and a friend to “win a new pair of shoes every month for a year” (Digital Fire, 2012).



Figure 15. The Zando email newsletter.

The campaign profiled and tracked user actions, and allowed readers to pass the email on to their friends easily. The Call to Action ‘click here to enter’ prompted readers to fill in their own details, and those of a friend, for the Zando database (Digital Fire, 2012).

The email was sent to 70 000 people in Zando’s target market from a well-maintained opt-in email database, with a second follow-up email sent later (Digital Fire, 2012).

16.7.4 The results

An impressive 29% of people who received the first email opened it, with 11 800 people entering the competition with their personal details and signing up to the Zando email newsletter (Digital Fire, 2012). This is a great result considering that traditionally direct mail has a response rate of around 0.1%.

The follow-up email was sent to competition entrants, thanking them for entering the competition and encouraging them to have a look at the Zando website. An astonishing 78% of these recipients clicked through, which resulted in more than 5 000 new visits to the Zando (Digital Fire, 2012).

Key elements that contributed to the campaign’s success were:

- A well-managed and filtered email contact database
- Striking design
- Effective copy
- A strong Call to Action
- An enticing incentive
- The entering mechanism where the reader and a friend’s details were requested

The viral sharing element particularly contributed to the campaign’s success (Digital Fire, 2012).

16.8 The bigger picture

While email marketing can operate as a stand-alone marketing campaign, integrating it with other channels, both online and offline, will serve to reinforce the brand’s message and increase responses.

There should never be a disparity between the content, tone or design of an email when compared to the rest of a company’s offerings. In-store promotions can be reinforced and promoted to an email database, or website information can be summarised for email.

Custom landing pages, if required, should be created for any promotions being communicated by email. For the most part, marketing emails should aim to get the customer to the site; landing pages are therefore essential. They need to be optimised to close the Call to Action. So the email gets the subscriber onto the page and the landing page gets them to sign up, buy, or engage. The idea is to create a flow between the two that brings the 'selling' process full circle – whether it's actually buying something or just reading through the content to engage them with the brand.

Email marketing and social media work very well together for cross-channel promotion. Where email can create a one-on-one feel between a brand and an individual, social media can move that attention towards a sense of community and keep your reader involved in a dialogue.

16.9 Summary

Email marketing is a form of direct marketing that can deliver the best ROI of any digital marketing tactic. It is:

- **Highly targeted and customisable**
- **Cost effective**
- **Easy to set up, test and track**

Gaining explicit permission to send email marketing to a person is a prerequisite for successful email marketing. Once you have this permission, all emails sent by an organisation and the individuals in that organisation can be seen as marketing opportunities.

Successful email marketing requires careful planning and testing. HTML emails need to be tested across a range of email clients, and should be tested for a spam score, before being deployed.

All email sent to a list of subscribers needs to provide an easy and accessible unsubscribe link in the email. Make sure you adhere to your local regulations for email marketing.

16.10 Case study questions

1. Which elements of Zando's email marketing constitute best practice?
2. What role did the database play in this example? Why was it so important?
3. Explain how viral sharing played a role in the success of this campaign.

16.11 Chapter questions

1. What is meant by 'mass customisation', and why is this so beneficial?
2. What are the key differences between direct marketing by email and direct marketing by post?
3. Why is it important for permission to be gained before marketing by email to a prospect?
4. Emails that are expected and recognised are more likely to be read. How can a marketer use this knowledge to increase the readership of emails?

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17

Mobile
Marketing

What's inside: The **key terms and concepts** required for understanding mobile marketing. We then include an introduction to marketing through **SMS, MMS, USSD** and **augmented reality**. We explore **mobile analytics** and mechanics for measuring your mobile marketing efforts.

17.1 Introduction

The mobile web is ubiquitous; six out of every seven people in the world use a mobile phone – that’s six billion people (Wang, 2013). More people are active on Facebook through mobile devices than desktop (Tam, 2013); comScore research shows that Americans spent 225.4 billion minutes on the Facebook mobile app and mobi site during the second quarter of 2013, and 18.4 billion minutes on Twitter’s mobile app and site (Vranica, 2013).

The Mobile Marketing Association (MMA) defines mobile marketing as “a set of practices that enables organisations to communicate and engage with their audience in an interactive and relevant manner through any mobile device or network” (Mobile Marketing Association, 2013).

Mobile devices are important to consider in any marketing strategy, and this chapter looks at the ways in which we can use mobile as part of an engagement strategy.

NOTE

Mobile engagement extends far beyond just the mobile phone, or just SMS marketing. It’s a mindset rather than a specific tactic. It’s all about context – reaching people at exactly the right time, place and mood to facilitate their needs, provide a convenient touchpoint and encourage them to convert.

It’s important to note that mobile marketing is very different in the developed world – where smartphones dominate, delivering rich web and application user experiences – and the developing world – where many phones are still text based, have crude WAP browsers, and radio, USSD and SMS are the most prolific services. Mobile users have a hierarchy of needs, which are fulfilled to various degrees by the capabilities of their devices:

Google’s marketing philosophy involves “reaching people in the moments that matter”. Mobile plays an essential part in this.

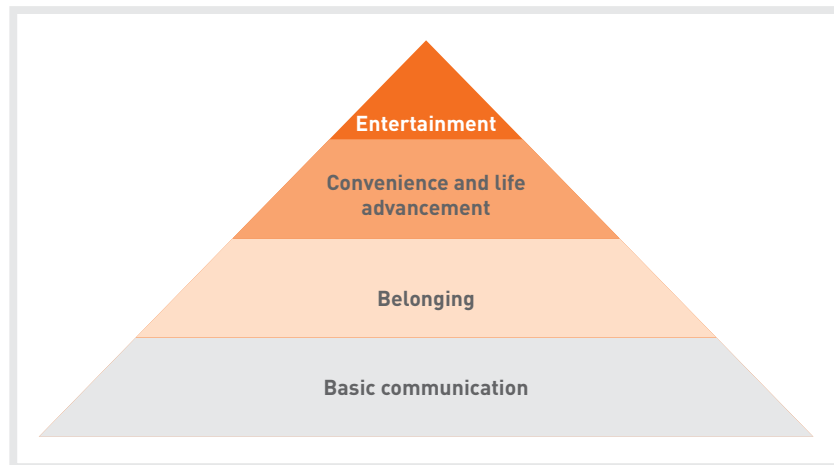


Figure 1. The mobile hierarchy of needs, devised by the Quirk Think team.

At the foundation, people use mobile devices to communicate – by voice, text or web access. Belonging addresses the need to be social and to form communities, using tools such as mobile social networks. Further up, mobile devices allow a great degree of on-the-go convenience, such as online shopping, research, mobile banking, career listings, coupons, and more – these more advanced capabilities are not available on very basic mobile devices. Education and information gathering also fit in here. Finally, mobile phones can entertain through games, apps and rich media.

Understanding where your target market falls on this scale will allow you to communicate more effectively with them, using the correct mobile channels and approaches.

In this chapter, you will learn:

- Why mobile is the most important communication channel available to marketers today
- A variety of mobile messaging channels and applications, from simple SMS messaging to advanced mobile commerce
- The role that mobile can play in a holistic marketing strategy, taking advantage of its unique features
- How to track and measure mobile activity

17.2 Key terms and concepts

Term	Definition
3G	Third Generation of mobile communications systems. A set of wireless protocols or standards used to transmit data to and from mobile devices. It is faster than previous generations, offering users a wider range of advanced services while achieving greater network capacity.
Application	Software that is developed specifically for smartphones and other mobile devices. Also known as an app. There are two types: mobile web apps and native apps.
Augmented reality (AR)	A variation of virtual reality that takes computer graphics and superimposes them onto the physical space around the person operating an AR device. These graphics can be 3D images or simply information tags about a location.
Bluetooth	A short-distance wireless transfer protocol for connecting devices.

Common Short Code (CSC)	A special number or code that can be used to address SMS and MMS messages from mobile phones or fixed phones, usually to get something in return.
Geo-targeting	Also known as location-based targeting. Delivering specific information or content to a user based on their geographic location. Mobile devices can enable this with high precision through features such as GPS and other location-based services.
Multimedia Message Service (MMS)	A media-rich extension of SMS, which allows picture, sound or low-quality videos to be sent on a wireless network.
QR code	Also known as a 2D barcode. These are scannable barcodes that can be read by certain mobile applications (by taking a photo of the barcode). They contain information such as a URL.
Short Message Service (SMS)	Text messages that can be sent to mobile phones from the Internet or from other mobile devices. Usually limited to 160 characters.
Unstructured Supplementary Service Data (USSD)	A messaging protocol used to connect mobile devices with a service provider's computers, often enabling a variety of applications and creating a real-time connection that allows two-way interaction.
Wireless Application Protocol (WAP)	A set of protocols used to connect mobile phones to the Internet over a mobile wireless network.
Wireless Fidelity (Wi-Fi)	The transfer of information from one device to another over a distance without the use of wires.

17.3 The role of mobile in personal communication

Mobile is an excellent marketing, advertising and distribution channel due to its always-on, always nearby nature. As mobile devices offer constant access and communication to users, they add a layer of interaction to existing real-world relationships.

17.3.1 Six unique features of mobile

Tomi Ahonen, an expert in mobile communications, has laid out six features that are unique to mobile and act as a framework for understanding mobile communications (Ahonen, 2008). These features affect the way we create and view mobile content.

1. Mobile devices are personal.

While most computers do present a personal connection to the Internet, they are not as personal as mobile devices. Mobile phones are part of people's personal presentation and their social affiliations.

The implication for marketers: Respect for privacy and permission is important in all aspects of marketing, particularly when it comes to mobile.

2. Mobile devices are always carried.

Consider your own behaviour: what do you take with you when you leave your house – wallet, keys and mobile phone?

The implication for marketers: Messages sent to mobile devices will most likely be accessed within minutes of being received. Messages sent to recipients can be read and acted on immediately.

3. Mobile devices are always on.

In order to fulfil its primary function – as a communication tool – the mobile device is always on.

The implication for marketers: Marketers need to be even more sensitive with their marketing communications. Not many people would appreciate an SMS at 4am informing them of a special offer.

4. Mobile devices have a built-in payment system.

All mobile phones (and many other mobile devices) have a built-in payment mechanism – the SIM card. Billing is easily handled through the user's mobile network. On top of that, paying for content and downloads has been built into the way that consumers use their devices.

The implication for marketers: Consumers are willing to pay for services and content on their mobile devices. Advertising is not the only way to generate revenue for content.

5. Mobile devices are available at the point of creative inspiration.

The mobile device features a number of tools that let users act on creative impulse, from taking photos and videos to becoming a scribbling pad on which to jot down ideas. Tools like Instagram, Evernote and Snapchat are purpose built for creating, sharing and consuming creative content.

The implication for marketers: This feature can be used to encourage interactivity within campaigns created for mobile. It presents the mobile device as a useful

NOTE

Think about your own habits: when was the last time your mobile phone was out of reach, or turned off?

NOTE

Read more about this in the *Customer Relationship Management* chapter.

tool in viral campaigns based on consumer-generated content. The flipside is that people can also post negative brand messages in the heat of the moment if they have a bad experience; online monitoring and CRM should be considered here for managing any potential backlash.

6. Mobile devices allow accurate audience measurement.

Every transaction made on a mobile device can be uniquely tracked, whether the transaction is a voice call, an SMS message or access to the Internet. They also allow for real-time tracking, where campaigns can be tweaked as they are run, and for location-based tracking, where customers receive marketing messages based on where they are physically located.

The implication for marketers: Aggregated data provides profiling and segmenting opportunities for targeting the right audience. Campaigns can also be accurately measured and tracked for their return on investment (ROI). As always, make sure you are respecting your customers' privacy and obtaining their consent.

17.3.2 Mobile devices: An overview

Mobile devices span beyond just mobile phones. While we focus on mobile phones in this chapter, since those are the most prevalent, it's important to acknowledge that mobile devices include portable game consoles, media players, global positioning systems and tablets.

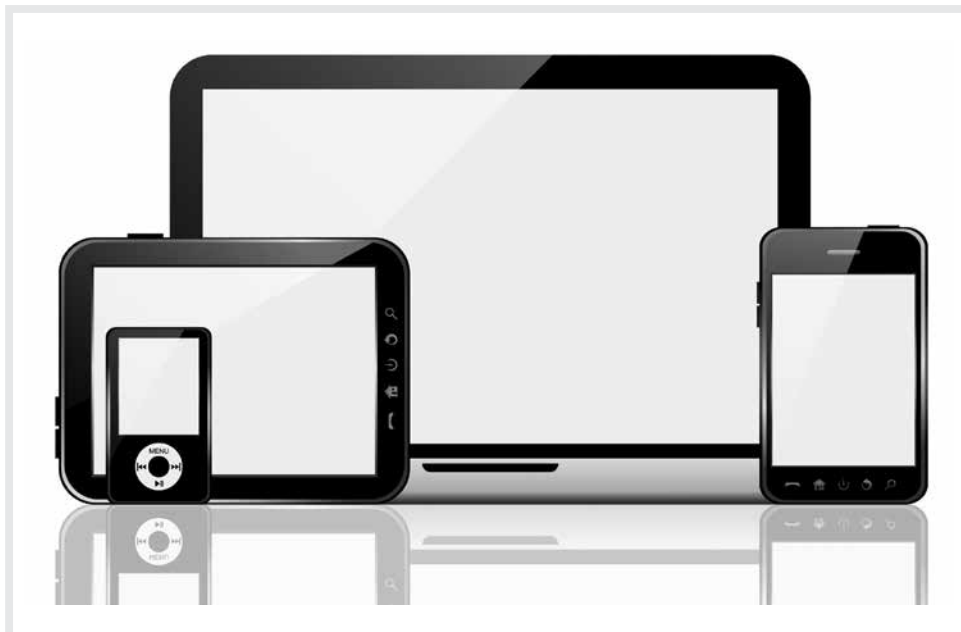


Figure 2. 'Mobile' includes many different mobile devices.

Of course, many people own more than one mobile device, or use it in connection with various other devices. This phenomenon of multiscreen usage is very important for marketers to understand. Here are some common scenarios:

- People often browse eCommerce websites using their mobile device, but then make the final purchasing decision at a desktop computer.
- Similarly, customers may use their mobile devices in physical retail outlets to scan, compare and research items, making their purchase later once they've had the chance to research in more detail.
- Commonly, people use a mobile device like a smartphone or a tablet while watching TV, simultaneously engaging with two screens and streams of content at once.

By understanding how your audience uses their devices in combination, or at different stages of the sales process, you can improve your CRM, marketing and analytics processes.

Mobile network standards

When it comes to mobile, there tend to be lots of confusing acronyms and technical terms to understand; as a marketer, however, it's not vital to understand all the nitty gritty details. To keep things simple, mobile network standards are the technologies used to connect a mobile device to the mobile network. There are three main ones you should know:

- GSM is the most widespread global network standard and is found across Europe, Africa, and most other parts of the world
- CDMA is predominantly found in the US, Canada and some Asian countries
- LTE is an upcoming, upgraded and faster version of GSM

17.4 Mobile messaging channels

There are many features built into the mobile phone that can form a part of your marketing campaigns.

17.4.1 SMS

Short Message Service (SMS) is the largest data application on the planet. By the end of 2013, mobile users will be sending 19.5 billion SMSs per day (Clark-Dickson, 2013). It is also one of the simplest and most effective mobile marketing channels available. Interestingly, SMS messages were initially designed as a way for network engineers to conduct tests on mobile networks, and not for commercial use at all.

NOTE

Reality TV shows take advantage of this by providing a number that viewers can contact to vote, share comments or affect the outcome of the programme.

SMS messages can be a maximum of 160 characters long, although it is possible to string several together in order to send longer messages (this is called concatenating). Messages can be sent from one phone to another or from a desktop computer to a phone and vice versa.

Almost all mobile phones support SMS. The restriction on the amount of data that can be communicated through SMS demands simplicity, and so consideration must be given to working creatively within the space of the small screen.

NOTE

SMS has useful marketing applications. It enables two-way communication, which allows subscribers to activate services and cheaply access important information. However, abusing this type of communication can also be problematic. The mobile phone is a highly personal device, and the potential to invade a mobile user's personal space is much greater.

SMS and marketing

With the massive volume of SMS messages being sent every day, SMS marketing must be considered by marketers. However, mobile phone users have proved reluctant to hand over their phone numbers for marketing messages, perhaps fearing a similar deluge of spam to the one they receive in their email inboxes.

This is changing to some extent, with the prevalence of Common Short Codes (CSC) in marketing. CSCs are short codes used in text messages, usually to get something in return, such as a competition entry. These can be sent to and from consumers, and often use keywords. There are two standard keywords that should always elicit a standard response:

- **STOP.** Unsubscribe the sender's number from the service.
- **HELP.** A support request from the sender's number.



Figure 3. A Common Short Code on a competition entry from Spark ATM.

As consumers are comfortable with using text messages for their communication, no extensive education process is required to have consumers access marketing campaigns based on CSCs.

There are several ways that SMS messages can be used to complement an existing marketing strategy.

Customer relationship management

SMS updates can be an exceptionally useful tool for customer relationship management (CRM). In the travel industry, hotel and airplane reservations can be sent by mobile phone, with updates being sent close to the time of travel. These short messages can include directions or details of a flight's status. When it comes to insurance claims or order processing, SMS updates on the progress of a claim or order can reduce call centre volumes and go a long way to ensuring that a client feels valued.

Promotions

SMS messages allow you to send timely sales promotions to a large database for a relatively low cost. These can be targeted to a particular time of day when prospects are most likely to be out shopping.

Receiving messages

CSCs are often used to receive messages from prospects or customers. They provide a fast, instant and trackable means for the public to enter competitions, voice opinions, or make requests. Even better for a company, the costs can often be passed on to the consumer, meaning that it can be a cost-effective way to receive marketing messages.

Please call me messages

Please call me messages – SMSs that are sent for free, asking the recipient to phone the sender back – are popular across Africa. These usually include an advert after the message, and this is an excellent position to reach lower-LSM users, who are more likely to be sending these messages.

17.4.2 MMS

Multimedia Messaging Service (MMS) is the media-rich version of SMS messages, and can contain graphics, audio, video, or images and text. These messages allow for richer information to be sent using WAP, but the costs are considerably higher.

MMS messages are particularly useful in viral campaigns, encouraging participants to use their phones to create content (photographic, audio or video) and pass on content. However, MMS usage doesn't appear to be a cost-effective method for marketers as it requires the recipient to bear considerable data costs to receive the messages.

17.4.3 Wi-Fi and Bluetooth

Apart from cellular network connectivity, most modern mobile devices have the ability to connect via Wi-Fi or Bluetooth.



Figure 4. The Bluetooth logo.

NOTE

If a user sets his or her Bluetooth-enabled mobile device to 'discoverable', Bluetooth devices within range of the phone can request to connect to it and exchange messages and data. This can be used to send location-specific marketing messages, such as discount codes in a shopping mall.

17.4.4 USSD

Unstructured supplementary service data (USSD) is an alternative messaging system to SMS and is available on most mobile data networks.

Unlike SMS, USSD is a protocol that allows a query-and-response action between the customer and a service centre. USSD services are initiated by the user, who enters a code on the device and then sends that as a request to the network. The code differs from the number to which an SMS is sent because it includes the symbols # and *. For example, a code like *100# can be used to check the balance of a prepaid airtime account.

These services are often used by networks to provide a service to a customer, such as requesting balance information, adding credit to a prepaid contract or passing on credit to another mobile phone user. Using USSD can also help you build up a profile of your customer, by tracking the kinds of interactions and services they engage in. On top of that, USSD can be used to gather data for CRM purposes, and to conduct surveys, in which you can gather specific data about respondents.

USSD also allows users to complete a double opt in, which is required in some jurisdictions before you can send marketing messages to a recipient.

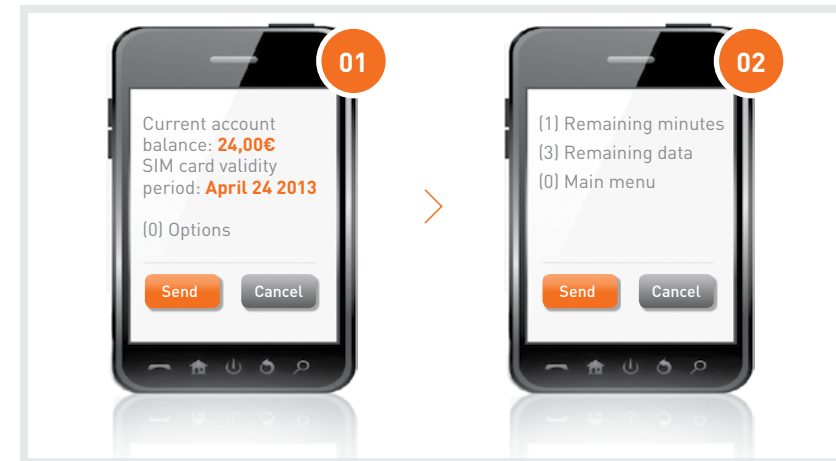


Figure 5. How USSD appears on a phone.

It is a rudimentary navigation process, but with far faster response times and lower costs when compared to SMS or to mobile browsing. In lower-income markets where web access is not prevalent, USSD can be a very powerful tool for engaging mobile users – it has a high success rate, low technological barrier to entry, and a low cost for the marketer.

M-Pesa is a mobile money-transfer service that was created in Kenya in 2007. It was devised to allow urban workers to send money home to their rural families, who had little or no access to banking or postal services, but who owned or could access a mobile phone. Since the money is transferred by SMS or USSD, no Internet access is required either.

M-Pesa has been so successful in Kenya that it has over 10.5 million active monthly subscribers, who have transferred over \$5.9 billion (between October 2012 and March 2013) through 65,547 registered agents around the country (Safaricom, 2013).

M-Pesa has been rolled out to countries across sub-Saharan Africa and Asia.

17.4.5 Instant messaging

Instant messaging makes it possible for people to exchange messages in real time. To users, it offers many of the benefits of SMS, but it is instant and often cheaper. According to Juniper Research, mobile IM users will exceed 1.3 billion globally by 2016. The report also states that the market is fragmented across a wide range of apps and service providers (mobiThinking, 2012).

IM applications are available to users who own smartphones and also on some feature phones. Some of the better known are BlackBerry Messenger, WeChat and

WhatsApp, which can be installed on any smartphone and some feature phones. Other device-agnostic services include Google Talk and Skype.

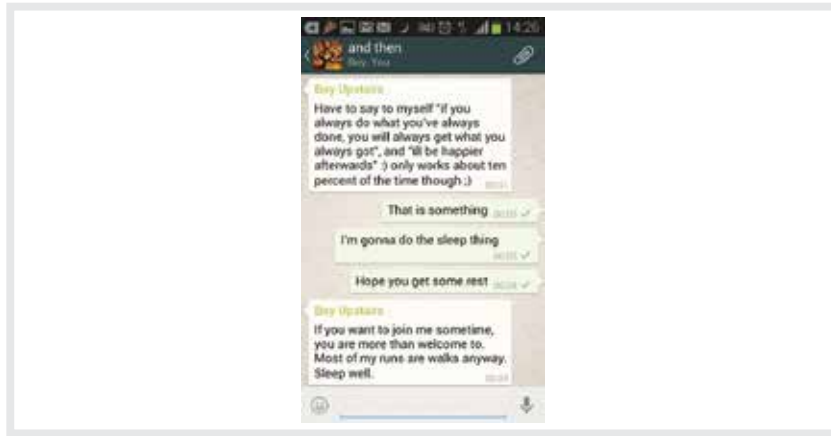


Figure 6. A WhatsApp discussion on a mobile phone.

From a marketer's point of view, IM can offer a channel for customer support, but presents even more of a risk in terms of alienating or angering consumers. This is a space reserved for personal contacts. That said, instant support gives you the chance to reach customers when they are focused on your service or product. This relies on the assumption that you are available to provide the information needed instantly. The alternative would just frustrate users.

17.4.6 QR codes

QR codes, also called 2D barcodes, offer a way to compress complex information into an image that can be decoded by your mobile phone.

QR codes can offer users with camera phones a convenient way to get information with just one click. Once you have installed a QR code reading app, these barcodes can be interpreted by the phone's camera to provide website URLs, contact information, discount vouchers, or even to activate downloads.



Figure 7. The QR code for the GottaQuirk blog.

The image on the left may look like a hybrid between a crossword and a Sudoku puzzle, but it's really the QR code for the URL of the mobile version of the marketing blog GottaQuirk, m.gottaquirk.com.

QR codes are a pull technology – they allow users to take the actions they want conveniently and quickly. They can be useful for sharing product or promotional information. One of the exciting benefits of QR codes is that they offer a way to activate offline advertising and make it interactive and measurable. A print campaign can, for example, include a barcode that can be used to send a user directly to your website.

QR codes are especially popular in East Asian countries, where the large prevalence of sophisticated smartphones makes accessing and using them easy.

However, QR codes do have their issues. They can be prone to bugs, and they also face a large barrier to entry for most smartphone users (since it is necessary to first install a specialised app before you can scan and use QR codes).

NOTE

Have you ever scanned a QR code with your phone? What was the experience like? If not, what is holding you back?

17.4.7 Automated voicemail messages

Automated voicemail messaging (AVM) involves creating a pre-recorded voice message that customers can hear if they dial a specific number. This is a popular option in emerging markets where literacy rates are low. It also provides an excellent way to capitalise on a celebrity endorsement, since the celebrity can record one message and have it be distributed to callers around the country.

17.4.8 Voice technologies

These days, mobile phones can also be controlled through voice commands. Sophisticated voice-activated applications like Siri on the iPhone allow users to perform complex tasks simply by asking a question or requesting an action out loud. For example, Siri responds to queries like "What is the weather like in Denver?" and "Can you move my 9am meeting to lunch time?" by analysing the key words used and returning the correct information, or completing the task. You can find out more about Siri here: www.apple.com/ios/siri.

There are also less-complex versions of voice-based control, for example in Google search, where the user can speak a query rather than typing it (which is beneficial on mobile, considering the typical hassle of typing on a small device).

Another mobile voice technology is interactive voice response (IVR). IVR is used in automated telephone systems to navigate through the menus. Rather than pressing a specific key to select an option, the user simply speaks their choice.

Voice technologies are exciting, convenient and easy to use. However, there is still a relatively high rate of inaccuracy in the technology, leading to misunderstood voice inputs and frustrations.

17.5 Location and mobile

Convenience and location are two cornerstones of the mobile marketing world. If services and useful information can be shared based on a user's location, the possibilities for conversion naturally increase. The more contextually relevant your marketing message is to the user, the more likely they are to engage.

A survey conducted by the Pew Internet and American Life Project found that 74% of smartphone users use their mobile phones to find locations. Google found that 68% of mobile users visited the business after searching for it on a smartphone (Google, 2012). And 67% of users surveyed shared that they would be more likely to buy if the website were designed for mobile devices (Google, 2012).

17.5.1 Geo-location

Combining mobile marketing techniques with geo-location can go a long way in providing customers with what they need.

There are a few different scenarios possible for implementing location in your mobile marketing campaigns. Location-targeted search offers some significant benefits. If searching for a local doctor, for example, it would be immensely useful to find the closest one and a map to his or her location in the first listed result. Localised news results could also offer a better user experience for someone conducting a mobile news search. Combining short codes or QR codes with print advertising in an area is another way to provide consumers with geo-relevant information. A QR code in a store or on a poster could offer a discount voucher to someone coming to the local retail outlet, for example.

NOTE

Google Free Zone is another example of a zero-rated service. It allows people in specific countries to access Gmail, Google+ and Google search on mobile without incurring any data costs.

To reach customers in areas of the world where data is scarcer and more expensive, some online services are turning towards a 'zero rating' system – which means that users don't pay for data when accessing that particular service.

For example, Facebook launched its Facebook Zero service in Africa to massive success. Accessing the simple, text-based website was free to all users. Just 18 months after launching, the number of Facebook users in Africa had increased by 114% (Mims, 2012).

When combined with location awareness, mobile search offers a targeted user experience.

If a website can detect what device someone is using and where they are, content customised to their location could be delivered, either automatically or after user input.

17.5.2 Mobile social networks

What are mobile social networks? Online social networks have extended their presence to mobile phones.

- m.facebook.com
- m.twitter.com

In addition, there are several social networks created specifically for mobile devices and centred on the potential of location-specific awareness. One example is Instagram (instagram.com).

One successful example of mobile social networking is Mxit. This South African company runs a messaging and social networking platform that is popular among the South African youth. With 7.5 million monthly active users (McConnachie, 2013), Mxit is a cheaper messaging alternative to standard SMS. In addition to the chat rooms in which users interact, Mxit offers brands the option to sell multimedia downloads and customised skins, and to create branded chat rooms for specific competitions or promotions. Mxit has its own currency – Moola – which enables purchases via Mxit's Tradepost commerce system. This ties in with Toni Ahonen's important observation about mobile devices having a built-in payment system – after all, Moola can be purchased using prepaid airtime and then spent on games, images, music tracks and more.

Many social media and social networking sites are also adopting and encouraging geo-tagging as a way for users to comment on posts. Services such as Foursquare (www.foursquare.com) and Facebook encourage users to 'check in' when they are at various locations. Foursquare also offers a social incentive to check in at locations – the people who visit the most become the 'Mayor' and can get cash discounts or vouchers at participating locations.



Figure 8. A super mayor badge from Foursquare.

Coffee giant Starbucks and clothing brand Gap are two brands that make frequent use of Foursquare for deals, limited-time offers and loyalty rewards. Have a look at their listings here: foursquare.com/starbucks and foursquare.com/gap.

Some platforms allow people to tag locations with notes or information, and to let their friends or contacts know where they are. Some users prefer not to do this, but for others, the ability to comment on their daily lives is exciting and connects them with people who may not be physically near them through content.

Mobile social networks can also have operational value, especially from a sales and leads perspective. As getting work done becomes more important than where it is done, communication tools are more and more essential to CRM. And mobile devices lie at the centre of this.

NOTE

Read more about this in the *Search Engine Optimisation* chapter.

As the different networks evolve, it is worth considering the potential of social search as well. Product or brand searches based around social networks and location can be a powerful tool: personal referrals are now combined with location-specific information.

Because of the prevalence of mobile, there is a strong strategic incentive to provide free, fast Wi-Fi networks to customers who visit physical retail outlets, restaurants or shopping centres. Not only does this provide a great selling point, it also gives the marketer a channel to communicate with and gain information from customers. For example, this lets you track their mobile behaviour and location (with permission, of course), send coupons and offers, engage in CRM-related questionnaires, provide helpful information and support, and more.

17.5.3 Considerations for location-based mobile marketing

Location-based mobile marketing naturally presents a number of concerns and challenges when it comes to user privacy. No one wants their location published without their permission, and notifications that suddenly pop up in certain areas could prove highly annoying if control doesn't remain in the hands of the user.

For this reason, marketers need to provide a method for people to unsubscribe. You could consider contacting users through alternative channels in order to check up on the service and allow them to customise the kinds of messages they receive.

It must be said, however, that implementation has not always lived up to potential. Possibilities such as geographic report-backs on the efficacy of campaigns in certain areas could be immensely valuable, but all of these services and ideas need input from mobile operators, advertising networks and marketing agencies. Network operators often closely guard all user information. Not all devices have

the same capabilities of revealing their location. In other words, options seem endless, but beware of the hype.

17.6 Mobile commerce

Mobile commerce covers a wide range of ways in which users can buy things through their mobile devices – whether it's shopping from the mobile browser, paying with airtime for apps and games, or using the phone's built-in technology at the point of sale.

Setting up a successful mobile commerce experience requires that you consider who your mobile customers are. What sorts of devices do they typically own? Are they comfortable with shopping online in general, and have they bought items on their mobile phones? Use these answers to inform your strategy.

Since there are so many physical, electronic and mobile payment options available, ensure that you cater to your market by providing a wide range of popular payment options. Do some research to discover what consumers in your region are using.

NOTE

One interesting mobile payment tool is Square (squareup.com) - it consists of a small device that attaches to the merchant's mobile phone, allowing them to swipe and process credit card purchases on the spot.

17.6.1 Mobile shopping

Mobile shopping has become hugely popular because of the flexibility and immediacy of the mobile device – by 2014, a quarter of Chinese smartphone and tablet users will shop online. This is twice as many as the rest of the world – still a large number (Naidu-Ghelani, 2013).

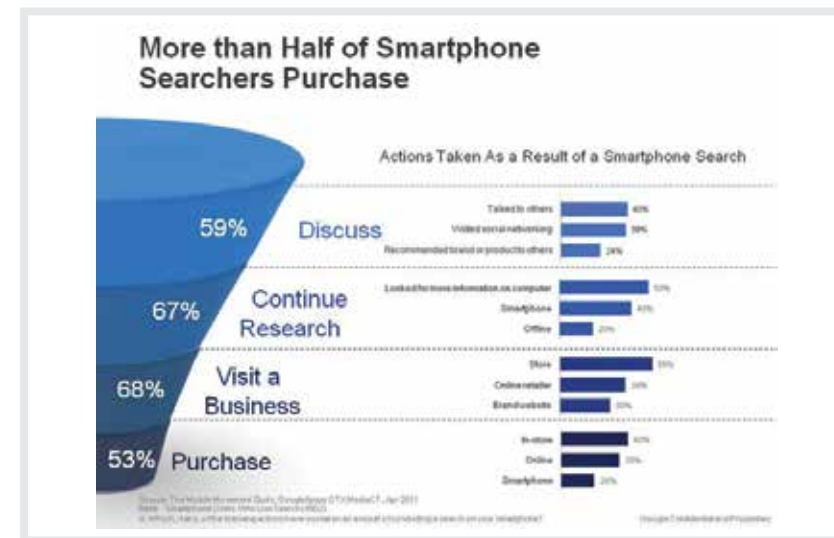


Figure 9. Over half of smartphone searchers make purchases. (Image source: Google/Ipsos).

Users can purchase goods or services wherever they are via the mobile web. They are also able to search for and compare products and prices. A spokesperson for eBay finds that mobile users follow through with purchases more often than desktop users do. A quarter of their new customers are on mobile devices [Kucera, 2013].

What do people buy online?

People buy most things online. While the final purchase of a car may be uncommon, the research that goes into making this purchasing decision is often rooted in the online and mobile space.

Apps and music are currently the most popular items bought through mobile devices, most likely because they involve smaller payments and less risk [Lightspeed Research, 2010]. This does not mean that other categories remain unexplored, however. The graphic below demonstrates that entertainment and content items dominate as the most popular currently.

NOTE

Read more about this in the *Market Research* chapter.

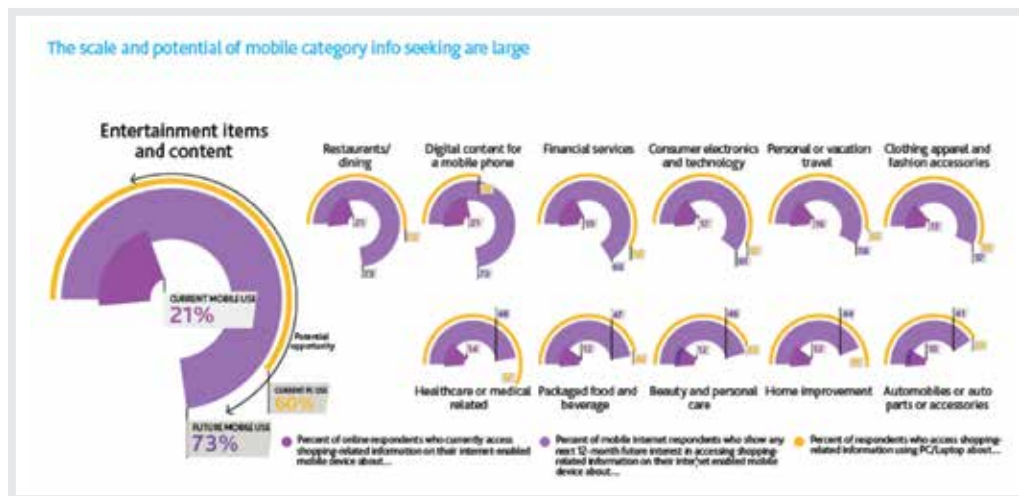


Figure 10. Types of goods purchased over mobile phones. [Nielsen/Yahoo, 2011]

There are various factors that influence a mobile shopper's behaviour and interests. The device and its interface, as well the context within which shopping is explored, have a significant impact on a mobile user's actions. Nielsen and Yahoo conducted research into mobile shopping and established nine mobile principles that define a user's mobile shopping experience (Nielsen, 2011).

These are:

1. **Location** – Mobile ads should be relevant to a user's current location.
2. **Goal orientation** – Users actively shop and look up category information and know what they need to do and how to achieve it.

3. **Attentiveness** – Users often give their full attention to category information.
4. **Killing time** – Users access content because they are bored.
5. **Taking my time** – Consumers use as much time as they need to complete a task.
6. **Urgency** – Users experience a sense of urgency about completing a task.
7. **Routine** – Users embrace the same method or process used to access category information.
8. **Passion** – They display a sense of enthusiasm about category information.
9. **Trust and security** – Users want to access a trusted and secure source.

Mobile commerce best practices

When building any mobile experience, and especially a mobile store, prioritise the user experience above everything else. Mobile users are purpose driven, search orientated, and clear on exactly what they are trying to locate – so make it as easy as possible for them to achieve their goal – which is to find and purchase an item.

- Include a prominent search bar and incorporate auto-suggest to make searching easier and quicker.
- Keep the menu short and clear, with only the most important items displayed. Focus on goals rather than simply long lists of items or categories.
- Make it easy to navigate by incorporating a prominent 'back' button at the top of every page.
- Lay out individual product pages simply, with the most important information at the top and a clear 'buy' button visible.
- Include an 'add to wishlist' or 'save this' button so that customers can find their favourite items later. This is especially handy if you also have a full eCommerce site, since customers can browse and research on mobile and then evaluate their purchases later at their desktop computers.
- Use images to draw attention and illustrate products.
- Allow users to sort search results so that they can quickly find exactly what they want.
- Ensure that users do not have to register to make a purchase – many will abandon the process if they are forced to fill out a complex form on the small screen.

NOTE

Read more about this in the *User Experience Design* chapter.

NOTE

However, images can increase a site's loading time, so ensure you keep their file sizes low.

Build the payment system with good security, and reassure users that their details are secure – after all, most people are afraid of transacting on mobile because of security concerns. Include a privacy policy and information about the security measures you have taken for users who want to access this information.

If you want to venture into mobile commerce, it is recommended that you start by developing a mobi site before you spend time and money creating a dedicated store application. Not only are people more likely to find you through web search, but the barriers for entry are much lower, since a site does not require the user to download anything. Program your full eCommerce site to redirect mobile customers to the mobi site to improve their experience.

Finally, promote your mCommerce platform across your other media (your website, social media channels and offline promotions). Offering a special mobile-only coupon can drive traffic to this platform and will make customers feel more at ease, since they are being directed there from more trusted sources. You can also experiment with QR codes, depending on whether your market is aware of and comfortable with this technology.

17.6.2 Near-Field Communication and mobile wallets

Near-Field Communication (NFC) technology allows data to be transferred over short distances through the use of data chips. This allows consumers to make payments on the spot by simply swiping or scanning their mobile device. In order for NFC to work, the consumer must have a chip in their mobile device and the merchant must have the hardware to scan that chip. NFC has become more common on smartphones, with almost 100 million mobile devices shipped in 2012 including the technology; however, it is not included on Apple's iPhones yet (McNulty, 2013).

A mobile wallet is a way of storing currency (or other payment methods, such as credit cards or PayPal account details) on a mobile device and then using the device to make payments. NFC is the most common technology used for this. Mobile wallets are typically used to make small purchases, such as movie tickets, snacks from vending machines and public transport tickets, but can also be used for bigger purchases in place of a credit card.



Figure 11. Using a mobile phone to make an NFC payment. (Jargon Media, 2011)

NFC payment has the potential to provide a seamless experience for the user. And it can potentially be used for far more than just payments – such as personal identification, loyalty cards, membership cards, and perhaps even the keys to your home or car.

17.6.3 Mobile ticketing and coupons

Mobile ticketing allows consumers to use their mobile devices to purchase and receive tickets for things such as their daily commute, secure parking, and concert seats.

Once a ticket has been purchased, a barcode, password or other identifiable piece of data is sent to the phone via SMS or MMS, and presented at the ticketing station. Mobile barcodes can be scanned quickly, making this paperless administration a lot easier, cheaper and more easily accessible.

Mobile coupons work in a similar way. Customers can receive a coupon from the brand – for example, by subscribing to an SMS marketing list, as a reward for completing a USSD survey, or simply by walking near a location-based mobile offer in a store window. Coupons are excellent for driving sales, offering free trials, retaining customers and more – especially among customers in the young, mobile-native demographics.

According to Juniper Research, mobile ticketing transactions will quadruple to 23 billion in 2016, from just 4 billion in 2011 (Juniper Research, 2012).

17.6.4 Mobile currency

This type of payment allows consumers to pay via a mobile phone using either e-currency or a mobile voucher. These are governed by the banking laws within a specific country. The major difference is the ability to draw money from the system. For merchants to make the most of these services, they must have online shopping enabled and register with the particular service.

There are various options available, such as M-Pesa, which is available in many African countries. For developing regions such as Africa – where 95% of adults do not have bank accounts (Heinrich, 2012), but almost all have access to a mobile phone – this is a significant benefit.

One of the key benefits of M-Pesa is that money can be sent by SMS or USSD, meaning that an Internet connection is not required. M-Pesa users can send e-money to other mobile users, regardless of their network provider. These mobile users can then convert the e-money back into cash via an M-Pesa outlet or a Nedbank ATM. Outlets are available at retail stores, Nedbank branches and elsewhere. This type of currency can work for even the most basic phone.

NOTE

Some public transport networks use NFC to make travelling quicker. For example, the Oyster system allows Londoners to swipe an NFC-enabled smartcard every time they want to take a bus, tube, tram or train.

17.6.5 Carrier-based payments

Carrier-based payments make use of expensive premium messages. This means that mobile devices can be used to make or receive payments. All a user has to do is provide the merchant with his or her mobile number for the transaction. They are then sent a special code via an SMS and billed for the cost of this premium SMS from their airtime balance. The carrier will then receive payment and the merchant will get a portion of this payment. Premium messages are usually used to sell mobile content such as ringtones, games, images, wallpapers and music.

17.6.6 Airtime as currency

It is increasingly common for airtime to be used as a form of currency, especially in developing nations where traditional infrastructure is less freely available. As other payment options develop, this may change, but for the moment the significance of this method should not be ignored. Airtime has immense value for individuals who depend on their mobile devices for access to a number of services and who opt for prepaid rather than contract options for financial reasons.

17.6.7 Mobile banking

NOTE

Mobile banking services are available through different mobile channels:

- **Mobile web:** Mobile web banking is when mobile users gain access to modified web versions of the bank's online site. This means that users have full access to their accounts in order to make payments, transfer funds and more. Mobile banking through this channel doesn't usually cost the user more than the online banking subscription.
- **Mobile app:** Mobile banking applications give users the ability to access a variety of account features through simple mobile-friendly processes. Through apps, users will have full access to their accounts.
- **Mobile text:** Mobile banking can also be conducted via SMS and USSD. This is useful for non-smartphone users. Mobile text banking involves banks sending alerts to customers via SMS, or allowing them to perform simple tasks, like transfers, via USSD. Alerts can be sent for account balances, payments, direct deposits, and other account activity. These services can be free or available at an additional cost, depending on the provider. The text messages themselves are for the consumer's cost with their mobile phone carriers.

17.7 Integrating mobile into online marketing

As you may have noticed, many of the chapters in this book discuss mobile applications or variations of standard online marketing strategies. We've done things this way because mobile is a mindset, not a specific and separate channel – so it should always be taken into account as a facet of any strategy you implement.

To recap, here are some of the key mobile implementations you can consider – have a look in the relevant chapters for more:

- User experience
- Email marketing
- Social media
- Mobile advertising
- Search advertising
- Search engine optimisation

17.8 Augmented reality

Augmented reality (AR) is a variation of virtual reality. Rather than immersing the user in a virtual world, however, AR takes computer graphics and superimposes them into 'reality' – the physical space around the person operating an AR device. These graphics can be 3D images or simply information tags about a location.

Google Glass is an exciting development in AR – this pair of glasses gives the viewer a digital data overlay over the real world.

While AR devices are relatively new, they do have a history outside their use in mobile. They can and have been used in medicine (superimposing surgical information onto a patient's body), architecture (superimposing virtual buildings into a space where they are yet to be built), or for long-distance collaboration where participants can't be in the same room.

Mobile-controlled concert in Japan

In 2013, Tokyo's Shiba Park played home to a one-of-a-kind concert – one controlled entirely by the audience's mobile phones. Concertgoers were asked to download the Odoroki app, which was specially built to enable interactions with one's environment. The area was turned into a mobile-operated theme park. Through interacting with the app, visitors could control vehicles, fountains, lighting, stage performances and even the illuminations on the city's iconic Tokyo Tower (Japan Trends, 2013).

17.8.1 Augmented reality in brand communications

The first use of AR in advertising was by HIT Lab NZ and Saatchi & Saatchi in 2005 for an application for the Wellington Zoo, which allowed users to view virtual animals by pointing their phone cameras at printed bar codes (Heinrich, 2012).

At present, applications have been interesting but often more gimmicky than useful. Some of the examples include an Ikea campaign that allowed people to view virtual versions of their furniture in their homes through their phone cameras (Butcher, 2010).

17.8.2 The future of augmented reality

NOTE

Do some research into the latest developments in AR technology - how much has changed since this textbook was published?

AR is relatively new and still has a long way to go. Barriers such as development costs and user education have held it back, but with smartphones and specialised AR devices becoming more common, the potential for AR applications is increasing as well.

Going forward, there are a number of challenges AR faces: investment in development and the potential for serious privacy concerns are the most notable. The image below illustrates what is possible when mobile, advertising, and geographical location are combined – exciting stuff.



Figure 12. Augmented reality on a mobile device.

17.8.3 The quantified self

Another way in which mobile devices are adding a digital layer to the real world is through the trend of the 'quantified self', also referred to as personal analytics. In essence, this is the practice of using mobile devices to measure your physical behaviours in order to improve health, better understand your habits, get fitter and measure your daily life in more detail.

Some examples of this include:

- Step counters built in to mobile phones to measure how active you are
- Sleep-tracking apps that show how peacefully you sleep and what nightly rhythms and patterns you display
- Devices like the Nike+ FuelBand that measure exercise and calories burned
- Time-tracking apps to show how much time you spend reading emails, on social media, and more

17.9 Mobile analytics

Analytics for mobile sites and applications is a relatively young field, but given that anyone investing in a new technology is interested in return on investment, being able to track the effectiveness of your campaign is an essential part of mobile marketing.

Traditional analytics, focusing on the web rather than the mobile web, has come a long way in providing us with information about what keywords brought users to our sites, which referrers were used, and how long people spent on a page, as well as a number of other metrics. Through various tools, you can gain insight into your users' actions and from there deduce information about their intent, using this to refine your web presence and campaigns.

While some would argue that both spheres face data collection challenges, there is an understanding that mobile analytics presents more challenges in terms of sourcing reliable data.

The first thing to acknowledge is that users of mobile analytics may be looking for different kinds of information. Given design challenges, primary information would include what device is being used, what network is being used, what browser is used, and then information about screen size.

NOTE

Read more about this in the *Data Analytics* chapter.

Judah Phillips of Metrics Insider lists the following challenges for mobile analytics:

- **Not all mobile browsers support JavaScript**, meaning that the most common method for collecting data is not available on a lot of mobile devices. Mobile analytics packages have had to come up with alternative implementation methods such as packet-sniffers and accessing log files.
- **Handset capability detection** can be a challenge for some packages, and is not offered as a rule. If this information is important for your site, you may need to investigate carefully the analytics package you use.

Beyond this, however, there are a number of tools that have developed to provide mobile analytics data. Some of the ones most often discussed include the offerings from AdMob and Google Analytics, which are both available for free. Google Analytics for mobile offers options for tracking iPhone and Android applications, and for tracking mobile websites. Its server-side tracking options can be used to track sites on phones that don't support JavaScript.

17.10 Advantages and challenges

The mobile phone has many benefits but also comes with its own challenges. Many mobile marketing mediums need little audience education, but marketers need to be careful when creating more complicated campaigns and applications. If there is an extensive education process required in order for a campaign to succeed, it probably needs to be rethought.

Because the mobile phone is so personal, permission and privacy need to be at the core of any mobile campaign. Unlike the situation with email or web pages, where there is space available on screen to explain privacy and permission, there is very little real estate on a mobile device to do so. Ensure that you have very clear permission to market to the phone numbers on your database and that it is easy for users to opt out of receiving your messages.

NOTE

How can responsive web design help meet the challenge of non-standard mobile devices?

Mobile devices are even less standard than PCs. Not only do device models present myriad screen sizes; there are also several operating systems and browsers that are used. This can make standardising websites and campaign materials a challenge.

Mobile devices usually have a small screen and keypad or touch interface. When it comes to the mobile web, consider that devices do not have a mouse and full keyboard. These limited navigation options mean that inputting information and browsing can be harder.

17.11 Case study – Carling Black Label's "Be the Coach"

17.11.1 One-line summary

Carling Black Label engaged soccer fans with an innovative and successful mobile campaign tailored for feature phones.

17.11.2 The problem

Carling Black Label, a well-known South African beer brand, wanted to engage its market in an unprecedented way. The target market they wanted to reach had a low Internet penetration rate, but had a high rate of mobile access. They knew that many Black Label drinkers are also passionate soccer fans – who, like all fans around the world, thought that perhaps they could do a good job at coaching their favourite team, Kaiser Chiefs.

17.11.3 The solution

The brand identified that their target audience was active on mobile, but typically owned lower-end feature phones, so any mobile marketing campaign had to take this into account.

To create a feeling of involvement in the sport, Black Label created the "Be the Coach" campaign. Using mobile devices, fans could choose players for the team and even substitute a player right in the middle of a match. The campaign was advertised on Black Label bottles, TV and radio, as well as other media.

Fans used the code on the inside of the beer bottle cap to participate. Communicating through USSD, they voted on which players to include, and then participated during the live match by choosing which players should be substituted.

A mobile site was also purpose-built for the campaign, where team, player and voting information could be viewed, and fans could access the "Be the Coach" Facebook and Twitter profiles. Participants used their mobile numbers to sign in to the site; this low barrier to entry made the campaign easily accessible. Web-enabled mobile devices could access the campaign information through the site in real time.

Facebook ads, display ads and digital PR were also used to promote the campaign. Another important mobile aspect was the use of Mxit. The campaign was advertised for two weeks on this portal. Fans could create a "Be the Coach" profile on Mxit and visit the mobile site from there.

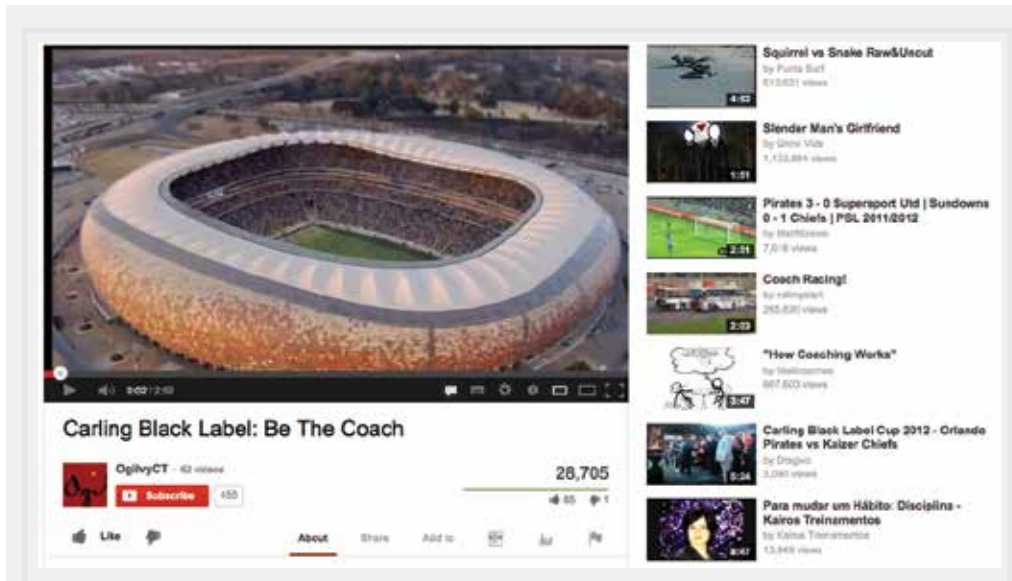


Figure 13. A video for the “Be the Coach” campaign.

17.11.4 The results

Over seven weeks of voting, the campaign created intense discussion among fans, players, coaches and journalists. It also garnered some incredibly impressive results:

- Fans voted more than 10.5 million times over the seven-week voting period.
- A record 85 000 tickets to the game were sold, and millions more watched from home.
- The Facebook and Twitter accounts grew by 450% and 600% respectively.
- The equivalent PR value of all this attention came in at over R83 million.
- The mobi site had 31 088 visitors (18 405 of these were unique), and users visited 6.97 pages on average, with an average time on site of 5 minutes 30 seconds.

On the day of the game, rival team Orlando Pirates won, but the fans did get to “Be the Coach” for Kaizer Chiefs (Ogilvy & Mather South Africa, n.d.).

17.12 The bigger picture

Mobile communications should always be considered in context within your other marketing communications. The mobile channel is not a separate one, but rather one that can be accessed and integrated with many other forms of communication.

One of mobile’s powerful characteristics is its ability to stitch media together – especially online

and offline marketing channels, since the mobile device can be physically located in the real-world space, and access the digital world at the same time.

We’ve listed earlier in this chapter some of the many marketing tactics of which mobile can form part. Mobile should also be a central consideration in your marketing and content strategy – consider the context of the user and how mobile content is consumed differently.

Mobile is also excellent in CRM and customer support, where it provides an always-on, always accessible channel to answer queries, resolve issues and reward customers.

17.13 Summary

The mobile device cannot be ignored as an important tool in any marketing campaign. There are messaging capabilities unique to mobile that can be very effective – from SMS to USSD and Bluetooth.

Exciting technological developments also open up the opportunities for interactive campaigns and mobile experiences. Although not widely adopted yet, QR codes can be the point of interaction that connects other media to the mobile device. Augmented reality campaigns can also create a rich interactive experience for a user by adding a layer of information to the real world.

As with any digital marketing approach, planning is vital. While mobile can offer a dazzling array of marketing and communication opportunities, knowing your audience will help you to best plan those most suited to your market and your campaign.

17.14 Case study questions

1. Why was USSD the best choice for this campaign?
2. Describe how the device combined real world experiences with digital options.
3. Are there any other mobile marketing options that you would have incorporated into this campaign?

17.15 Chapter questions

1. What makes SMS such a powerful marketing medium?
2. When is it a good idea to invest in an augmented reality application for your brand?
3. What are the main benefits and concerns of mobile advertising?
4. How would you go about deciding which engagement method is the best one for your target market?

17.16 Further reading

mobithinking.com – mobiThinking offers the latest stats and research into the rapidly changing mobile world.

www.comscore.com – comScore is one of the leading digital marketing websites, regularly releasing white papers and statistics.

www.mobilemarketer.com – Mobile Marketer, as the name implies, is geared heavily towards different forms of mobile marketing. Keep an eye on this site for news and developments in this industry.

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Part 4

Optimise

Introduction to Optimise

Planning, research and strategy are important for executing digital marketing campaigns that resonate with audiences. As part of executing these strategies, you need to create digital assets, and then use various channels to drive traffic to those assets, and build relationships with your visitors.

As you are doing all of this, it's important to know: is it actually working? And how might it all work better?

This is where Optimise comes in: the process by which we track, analyse and optimise our digital assets and campaigns to achieve the best results. (Yes, that's track, analyse and optimise, or TAO, so you'll never forget it.)

As Eric Schmidt, Executive Chairman of Google, said: "The Internet will transform advertising because of its trackability, not its beauty." Because most actions online are recorded, we can build a rich, data-driven picture of how our digital assets and online campaigns are performing. Digital allows us to use this data to test and improve our marketing efforts – and then release new, better versions of campaigns rapidly.

With user-friendly reporting interfaces and free, powerful web analytics tools such as Google Analytics, there is no excuse for not knowing what's happening in your campaigns. The chapter on Data Analytics will help you with the concepts and definitions you need, and will also help you to set objectives and key performance indicators (KPIs) so that you know what you need to measure.

It's easy to rely on web analytics tools to report the 'what' without applying your brain to understand the 'why' – and the 'what next'.

The chapter on Conversion Optimisation takes you through the steps of turning data into something useful: insights that let you transform website visitors into active customers.

Getting into a routine of using data to understand how your visitors are behaving and how you might influence that behaviour is what conversion optimisation is about. You need to use the web analytics data not just to report on how campaigns and digital assets are performing, but also to understand how to make them perform better.

18

Data Analytics

What's inside: You will learn about the different types of **web analytics packages**, and the benefits and challenges of each. The **metrics for data analytics** are introduced, as well as an approach to **understanding and analysing web data**. **Single page analysis packages** and **approaches** are also explained.

18.1 Introduction

Picture the scene: you've opened up a new fashion retail outlet in the trendiest shopping centre in town. You've spent a small fortune on advertising and branding. You've gone to great lengths to ensure that you're stocking all of the prestigious brands. Come opening day, your store is inundated with visitors and potential customers.

And yet, you are hardly making any sales. Could it be because you have one cashier for every hundred customers? Or possibly it's the fact that the smell of your freshly painted walls chases customers away before they complete a purchase?

NOTE

Analytics data can be found in many places, not just your website: consider data from email, social media, mobile and more.

While it can be difficult to isolate and track the factors affecting your revenue in this fictional store, move it online and you have a wealth of resources available to assist you with **tracking**, **analysing** and **optimising** your performance.

To a marketer, the Internet offers more than just new avenues of creativity. By its very nature, it allows you to track each click to your site and through your site. It takes the guesswork out of pinpointing the successful elements of a campaign, and can show you very quickly what's not working. It all comes down to knowing where to look, what to look for, and what to do with the information you find.

In this chapter, you will learn:

- How to set solid objectives, goals and measurements for your digital marketing campaigns
- How to capture web analytics data, and what data you can find
- Techniques and guidelines for analysing data to better understand your web visitors

18.2 Key terms and concepts

Term	Definition
A/B test	Also known as a split test, it involves testing two versions of the same page or site to see which performs better.
Click path	The journey a user takes through a website.
Conversion	Completing an action that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.

Conversion funnel	A defined path that visitors should take to reach the final objective.
Cookie	A small text file that is used to transfer information between browsers and web servers. They help web servers to provide the right content when it is requested.
Count	Raw figures captured for data analysis.
Event	A step a visitor takes in the conversion process.
Goal	The defined action that visitors should perform on a website, or the purpose of the website.
Heat map	A data visualisation tool that shows levels of activity on a web page in different colours.
JavaScript	A popular scripting language. Also used in web analytics for page tagging.
Key performance indicator (KPI)	A metric that shows whether an objective is being achieved.
Log file	A text file created on the server each time a click takes place, capturing all activity on the website.
Metric	A defined unit of measurement.
Multivariate test	Testing combinations of versions of the website to see which combination performs better.
Objective	A desired outcome of a digital marketing campaign.
Page tag	A piece of JavaScript code embedded on a web page and executed by the browser.
Ratio	An interpretation of data captured, usually one metric divided by another.
Referrer	The URL that originally generated the request for the current page.
Segmentation	Filtering visitors into distinct groups based on characteristics to analyse visits.
Target	A specific numeric benchmark.
Visitor	An individual visiting a website that is not a search engine spider or a script.

18.3 Working with data

In the days of traditional media, actionable data was a highly desired but scarce commodity. While it was possible to broadly understand consumer responses to marketing messages, it was often hard to pinpoint exactly what was happening, and why.

In the digital age, information is absolutely everywhere. Every single action taken online is recorded, which means there is an incredible wealth of data available to marketers to help them understand when, where, how and even why people react to their marketing campaigns.

This also means there is a responsibility on marketers to make data-driven decisions. Assumptions and gut feel are not enough – you need to back these up with solid facts and clear results.

Don't worry if you're not a 'numbers' person – working with data is very little about number crunching (the technology usually takes care of this for you) and a lot about analysing, experimenting, testing and questioning. All you need is a curious mind and an understanding of the key principles and tools.

Here are some data concepts you should be aware of.

18.3.1 Performance monitoring and trends

Data analytics is all about monitoring user behaviour and marketing campaign performance over time. The last part is crucial. There is little value in looking at a single point of data – you want to look at trends and changes over a set period.

NOTE

Pay close attention to any changes in the expected data, good or bad, and investigate any anomalies.

For example, it is quite meaningless to say that 10% of this month's web traffic converted – is that good or bad, high or low? But saying that 10% *more* people converted this month, as opposed to last month, shows a positive change or trend. While it can be tempting to focus on single 'hero' numbers and exciting-looking figures ('Look, we have 5 000 Facebook fans!'), these really don't give a full picture if they are not presented in context.

18.3.2 Big data

'Big data' is the term used to describe truly massive data sets – the ones that are so big and unwieldy that they require specialised software and massive computers to process. Companies like Google, Facebook and YouTube generate and collect so much data every day that they have entire warehouses full of hard drives to store it all.

Understanding how it works and how to think about data on this scale provides some valuable lessons for all analysts.

- **Measure trends, not absolute figures.** The more data you have, the more meaningful it is to look at how things change over time.
- **Focus on patterns.** With enough data, patterns over time should become apparent – consider looking at weekly, monthly or even seasonal flows.
- **Investigate anomalies.** If your expected pattern suddenly changes, try to find out why – and use this information to inform your actions going forward.

18.3.3 Data mining

Data mining is the process of finding patterns that are hidden in large numbers and databases. Rather than having a human analyst process the information, an automated computer program pulls apart the data and matches it to known patterns to deliver insights. Often, this can reveal surprising and unexpected results, and tends to break assumptions.

Data mining in action: Target

US retail chain Target uses data mining to market specific products to consumers based on their personal contexts. Target gathers a range of personal, psychographic and demographic data from customers and then analyses this against their shopping habits. They analyse their data and predict the products customers might be interested in, based on their lifestyle needs and choices (Duhigg, 2012).

Each customer is given a unique code called the Guest ID number. This is linked to all interactions the customer has with the brand, from using a credit card or calling in to the help line, to opening an email. They then gather data, including the following:

- Age
- Marital status
- Whether the customer has children, and how many
- Estimated salary
- Location
- Whether they've moved house recently
- Which credit cards they use
- Which websites they visit

Target is also able to buy data on their customers from other companies to supplement this, like:

- Ethnicity
- Employment history
- Favourite magazines
- Financial status
- Whether they've been divorced
- Which college they attended
- Their online interests
- Their favourite coffee brands
- Political leanings

For example, Target markets baby and pregnancy-related products to expectant moms and dads, from as early as the second trimester. How do they know to do this? Using this data, combined with customer shopping habits, Target has created a pregnancy-predictor model, determining whether a woman was pregnant (sometimes even before she knew it herself).

One father of a teenage girl complained to the store about sending his daughter marketing materials of this nature – but apologised to the retailer a short while later, after discovering that his teenage daughter was in fact pregnant, indicating that the predictor model did actually work [Duhigg, 2012].

However, Target has decided to be a bit subtler in how they use their valuable insights!

NOTE

Do you think Target's behaviour was ethical and appropriate? Is this an invasion of customer privacy?

18.3.4 A world of data

Another consideration to keep in mind is that data can be found and gathered from a variety of sources – you don't need to restrict yourself simply to website-based analytics. To get a full picture of audience insights, try to gather as wide a variety of information as you can. Some places to look:

- **Online data** – aside from your website, look at other places your audience interacts with you online, such as social media, email, forums and more. Most of these will have their own data-gathering tools (for example, look at Facebook Insights or your email service provider's send logs).
- **Databases** – look at any databases that store relevant customer information, like your contact database, CRM information or loyalty programs. These can often supplement anonymous data with some tangible demographic insights.

- **Software data** – data might also be gathered by certain kinds of software (for example, some web browsers gather information on user habits, crashes, problems and so on). If you produce software, consider adding a data-gathering feature (with the user's permission, of course) that captures usage information that you can use for future updates.
- **App store data** – app store analytics allows companies to monitor and analyse the way people download, pay for and use their apps. Marketplaces like the Google and Apple app stores should provide some useful data here.
- **Offline data** – and don't forget all the information available off the web – such as point-of-sale records, customer service logs, in-person surveys, in-store foot traffic, and much more.

18.4 Setting objectives, goals and KPIs

The key to success for any website or online campaign is designing it with specific, unique, clearly defined objectives in mind. These are used to measure the success of the website or campaign, and are crucial to maintaining focus within online activities. Sometimes, words such as 'objective' or 'goal' can be used in different situations with slightly different meanings. For the sake of clarity, this chapter will use them as described below.

The **objective** of a website or online campaign is aligned with the strategic outcomes of the business. The objective answers the question, "What do we want to achieve with this marketing campaign?" For example, an objective might be to increase sales of a product, grow brand awareness or increase website traffic.

The **goal** of a website or campaign in web analytics refers to an action that a user takes on a website or a type of user behaviour. This action could be making a purchase, signing up for a newsletter, or viewing a certain number of pages in a visit. A completed goal is called a conversion. Goals are derived from objectives, and answer the question, "What do we need users to do in order to achieve our objective?"

Key performance indicators or **KPIs** are metrics that are used to indicate whether objectives are being met. There are many metrics to be analysed, and determining which are important will help to focus on what really matters to a particular campaign. KPIs relate closely to goals, and answer the question, "What data do we need to look at to see if goals are being completed?" For example, if your objective is to increase website traffic, you may look at the number of website visitors, the percentage of new visitors, and how long users stay on the site.

NOTE

Goals related to visitor behaviour, such as time spent on site or pageviews per visit, are referred to as engagement goals.

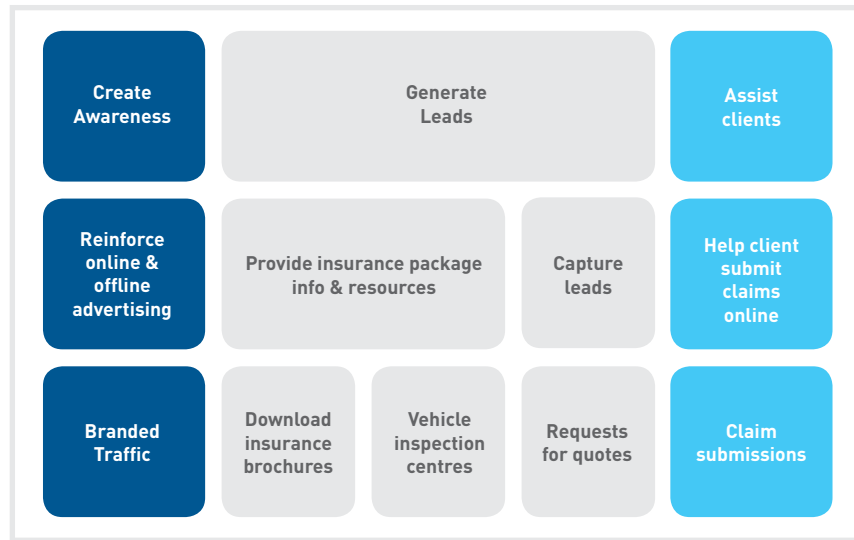


Figure 1. Objectives, goals and KPIs. (Adapted from Kaushik, 2010)

Targets are the actual target values that KPIs need to meet in order for the campaign to be declared a success. If one KPI is 'newsletter subscriptions', then a target might be '100 subscriptions every month' – if one month falls short at 70, this will quickly reveal that a fix is required.

Although a website has an ultimate goal, the process of achieving that goal can be broken down into several steps. These are called **events** or micro-conversions. Analysing each step in the process is called **funnel analysis** or path analysis and is critical to understanding where problems in the conversion process may lie.

For example, on a hotel website, the ultimate goal is that visitors to the site make a booking on the website with a credit card.

Each step in the process is an event that can be analysed as a conversion point.

Event 1: Perform a search for available dates for hotels in the desired area.

Event 2: Check prices and amenities for available hotels.

Event 3: Select a hotel and go to checkout.

Event 4: Enter personal and payment details and confirm booking (conversion).

One naturally expects fewer users at each step. Increasing the number of visitors who progress from one step to the next will go a long way to improving the overall conversion rate of the site.

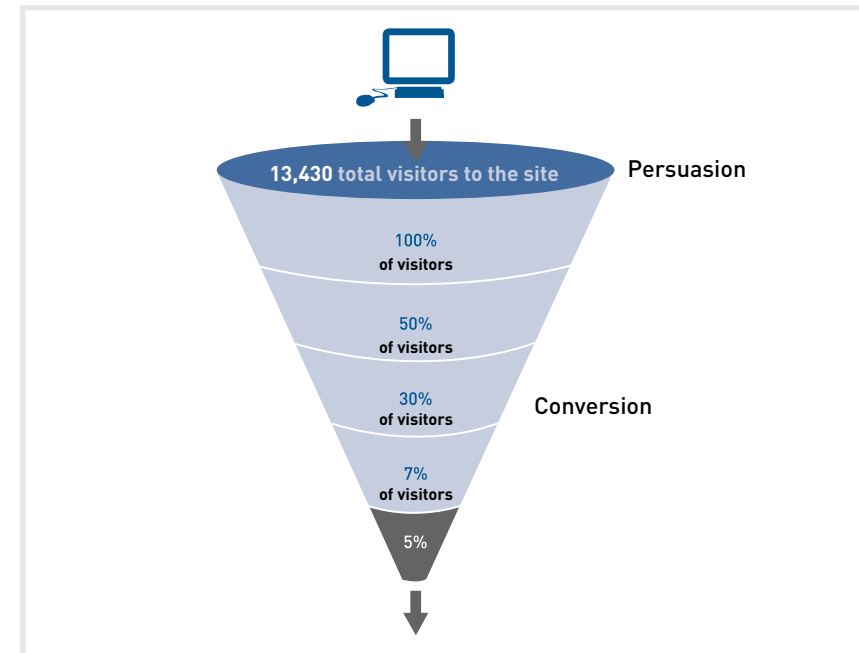


Figure 2. A conversion funnel.

Here are some examples of objectives, goals and KPIs for different websites.

Hospitality eCommerce site, such as www.expedia.com

- Objective:** increase bookings
- Objective:** decrease marketing expenses
- Goal:** make a reservation online
- KPIs:**
 - Conversion rate
 - Cost per visitor
 - Average order value

News and content sites, such as www.news24.com

- Objective:** increase readership and level of interest
- Objective:** increase time visitors spend on website
- Goal:** a minimum time on site
- KPIs:**
 - Length of visit
 - Average time spent on website
 - Percentage of returning visitors

NOTE
Remember to make your objectives SMART. For a refresher on what this means, have a look at the Digital Marketing Strategy chapter.

KPIs help you to look at the factors you can influence in the conversion process. For example, if your objective is to increase revenue, you could look at ways of increasing your conversion rate (that is, the number of visitors who purchase something). One way of increasing your conversion rate could be to offer a discount. So, you would have more sales, but probably a lower average order value. Or, you could look at ways of increasing the average order value, so that the conversion rate would stay the same, but you would increase the revenue from each conversion.

Once you have established your objectives, goals and KPIs, you need to track the data that will help you to analyse how you are performing, and will indicate how you can optimise your website or campaign.

18.5 Tracking and collecting data

Currently, there are two main approaches for collecting web analytics data: cookie-based tracking, and server-based tracking. A third option, called universal analytics, is set to dramatically change how data is gathered and analysed. Universal analytics is one of the most exciting examples of non-cookie-based server tracking.

18.5.1 How information is captured

Cookie-based tracking

The most common method of capturing web analytics is to use cookie-based tracking. Here's how it works:

1. The analyst adds a page tag (a piece of JavaScript code) to every page of the website.
2. A user accesses the page using their browser.
3. When the browser loads the page, it runs the page tag code.
4. This tag sends an array of information to a third-party server (like Google Analytics), a service that stores and collates the data.
5. The analyst accesses this data by logging in to the third-party server.

The data gathered this way can capture a wide array of factors about each visitor, from their device, operating system and screen resolution, to their long-term behaviour on your website. This is currently the most common option for most website tracking.

Server-based tracking

Web servers are the computers that websites are stored on so that they can be accessed online. Server-based tracking involves looking at log files – documents that are automatically created by servers and that record all clicks that take place on the server. A new line is written in a log file every time a new request is made – for example, clicking on a link or submitting a form.

Server-based tracking is very useful for tracking mobile visitors (since many phones cannot execute the cookie-based JavaScript tags) and is also essential for universal analytics, discussed below.

Comparing the options

Cookie-based tracking	Server-based tracking
Page tagging requires changes to the website and can be used by companies that do not run their own web servers.	Log files are produced by web servers, so the raw data is readily available, but the company must have access to the server.
Cookie-based tracking can be less accurate than server-based tracking. If a user's browser does not support JavaScript, for example, no information will be captured.	Log files are very accurate – they record every click. Log files also record visits from search engine spiders – useful for search engine optimisation.
Page tags are proprietary to each vendor, so switching can mean losing historical data.	Log files are in a standard format, so it is possible to switch vendors and still be able to analyse historical data.
Page tagging shows only successful page requests.	Log files record failed page requests.
JavaScript makes it easier to capture more information (e.g. products purchased, or the version of a user's browser).	Server-based tracking can capture some detailed information, but this involves modifying the URLs.
JavaScript tracking can report on events such as interactions with a Flash movie.	Server-based tracking cannot report on events.
Third-party page tagging service providers usually offer a good level of support.	Log file analysis software is often managed in-house.

Because these two options use different methods of collecting data, the raw figures produced will differ. For example, caching occurs when a browser stores some of the information for a web page, so that it can retrieve it more quickly when you return. Opening this cached page will not send a request to the server. This means that the visit won't show up in the log files, but would be captured by page tags.

NOTE

Pixel tracking can be used to track email campaigns. Here, a tiny 1 x 1 pixel is placed in the email. When you load the images in the email, you will also load the tiny image that tracks your activity.

Website analytics packages can be used to measure most, if not all, digital marketing campaigns. Website analysis should always account for the various campaigns being run. For example, generating high traffic volumes by employing various digital marketing tactics such as SEO, PPC and email marketing can prove to be a pointless and costly exercise if visitors are leaving your site without achieving one (or more) of your website's goals. Conversion optimisation aims to convert as many of a website's visitors as possible into active customers.

NOTE

Read more about this in the *Conversion Optimisation* chapter.

Universal analytics

Google recently announced a new feature in its analytics suite called universal analytics. The biggest problem web analysts have faced up until now is that they can't actually track individual people – only individual browsers (or devices), since this is done through cookies. So, if Joe visits the website from Chrome on his home computer, and Safari on his work laptop, the website will think he's two different people. And if Susan visits the site from the home computer, also using Chrome, the website will think she's the same user as Joe.

An additional concern is that cookies are on the decline. Most modern browsers allow users to block them, and many mobile devices simply can't access or execute them. With growing consumer privacy concerns, and new laws like the EU Privacy Directive (which requires all European websites to disclose their cookie usage), cookies are falling out of favour.

Universal analytics allows you to track visitors (that means real people) rather than simply sessions. By creating a unique identifier for each customer, universal analytics means you can track the user's full journey with the brand, regardless of the device or browser they use. So, that means you can track Joe on his home computer, work laptop, mobile phone during his lunch break, and even when he swipes his loyalty card at the point of sale.

Crucially, however, tracking Joe across devices requires both universal analytics and authentication on the site across devices – in other words, Joe has to be logged in to your website or online tool on his desktop, work laptop and mobile phone in order to be tracked this way. If he doesn't log in, we won't know it's the same person.

You can see:

- How visitors behave depending on the device they use (browsing for quick ideas on their smartphone, but checking out through the eCommerce portal on their desktop)
- How visitor behaviour changes the longer they are a fan of the brand – do they come back more often, for longer, or less often but with a clearer purpose?
- How often they're really interacting with your brand
- What their lifetime value and engagement is

Another useful feature of universal analytics is that it allows you to import data from other sources into Google Analytics – for example, CRM information or data from a point-of-sale cash register. This gives a much broader view of the customers and lets you see a more direct link between your online efforts and real-world behaviour.

NOTE

Universal analytics is a powerful leap forward in data analytics. How might this affect how brands understand their customers? And what privacy concerns may users have?

18.5.2 The type of information captured

KPIs are the metrics that help you understand how well you are meeting your objectives. A metric is a defined unit of measurement. Definitions can vary between various web analytics vendors depending on their approach to gathering data, but the standard definitions are provided here.

Web analytics metrics are divided into:

- **Counts** – these are the raw figures that will be used for analysis.
- **Ratios** – these are interpretations of the data that is counted.

Metrics can be applied to three different groupings:

- **Aggregate** – all traffic to the website for a defined period of time.
- **Segmented** – a subset of all traffic according to a specific filter, such as by campaign (PPC) or visitor type (new visitor vs. returning visitor).
- **Individual** – the activity of a single visitor for a defined period of time.

Here are some of the key metrics you will need to get started on with website analytics.

Building-block terms

These are the most basic web metrics. They tell you how much traffic your website is receiving. For example, looking at returning visitors can tell you how well your website creates loyalty; a website needs to grow the number of visitors who come back. An exception may be a support website – repeat visitors could indicate that the website has not been successful in solving the visitor's problem. Each website needs to be analysed based on its purpose.

- **Hit** – one page load (though this is an outdated term that we recommend you avoid using).
- **Page** – unit of content (so downloads and Flash files can be defined as pages).
- **Page views** – the number of times a page was successfully requested.

- **Visit or session** – an interaction by an individual with a website consisting of one or more page views within a specified period of time.
- **Unique visitors** – the number of individual people visiting the website one or more times within a set period of time. Each individual is counted only once.
 - *New visitor* – a unique visitor who visits the website for the first time ever in the period of time being analysed.
 - *Returning visitor* – a unique visitor who makes two or more visits (on the same device and browser) within the time period being analysed.

NOTE

New visitors show that you are reaching new audiences and markets, while returning visitors are an indicator of brand loyalty. Most websites should aim for a healthy balance between the two.



Figure 3. A breakdown of new versus returning visitors in Google Analytics.

Visit characteristics

These are some of the metrics that tell you how visitors reach your website, and how they move through the website. The way that a visitor navigates a website is called a click path. Looking at the referrers, both external and internal, allows you to gauge the click path that visitors take.

- **Entry page** – the first page of a visit.
- **Landing page** – the page intended to identify the beginning of the user experience resulting from a defined marketing effort.
- **Exit page** – the last page of a visit.
- **Visit duration** – the length of time in a session.

Landing Page	Visits	Pages / Visit	Avg. Visit Duration	% New Visits	Bounce Rate
	5,381	1.48	00:00:59	81.06%	79.91%
	% of Total: 100.00%	Site Avg: 1.48	Site Avg: 00:00:59	Site Avg: 81.06%	Site Avg: 79.91%
1. /	808	2.15	00:02:19	81.82%	82.80%
2. /	802	1.16	00:00:40	84.42%	86.25%
3. /	285	1.33	00:00:33	80.63%	83.16%

Figure 4. Visitor behaviour in Google Analytics.

- **Referrer** – the URL that originally generated the request for the current page.
 - *Internal referrer* – a URL that is part of the same website.
 - *External referrer* – a URL that is outside of the website.
 - *Search referrer* – a URL that is generated by a search function.
 - *Visit referrer* – a URL that originated from a particular visit.
 - *Original referrer* – a URL that sent a new visitor to the website.
- **Clickthrough** – the number of times a link was clicked by a visitor.
- **Clickthrough rate** – the number of times a link was clicked divided by the number of times it was seen (impressions).
- **Page views per visit** – the number of page views in a reporting period divided by the number of visits in that same period to get an average of how many pages are being viewed per visit.

Content characteristics

When a visitor views a page, they have two options: leave the website, or view another page on the website. These metrics tell you how visitors react to your content. Bounce rate can be one of the most important metrics that you measure. There are a few exceptions, but a high bounce rate usually means high dissatisfaction with a web page.

- **Page exit ratio** – number of exits from a page divided by total number of page views of that page.
- **Single page visits** – visits that consist of one page, even if that page was viewed a number of times.
- **Bounces (or single page view visits)** – visits consisting of a single page view.
- **Bounce rate** – single page view visits divided by entry pages.

NOTE

A high bounce rate is not always bad. On a blog, for example, most people click through from a search to read one article and, having satisfied their curiosity, leave without visiting any other pages.

Conversion metrics

These metrics give insight into whether you are achieving your analytics goals (and through those, you overall website objectives).

- **Event** – a recorded action that has a specific time assigned to it by the browser or the server.
- **Conversion** – a visitor completing a target action.



Figure 5. Goal conversions in Google Analytics.

Mobile metrics

When it comes to mobile data, there are no special, new or different metrics to use. However, you will probably be focusing your attention on some key aspects that are particularly relevant here – namely technologies and the user experience.

- **Device category** – whether the visit came from a desktop, mobile or tablet device.
- **Mobile device info** – the specific brand and make of the mobile device.
- **Mobile input selector** – the main input method for the device (e.g. touchscreen, clickwheel, stylus).
- **Operating system** – the OS that the device runs (some popular ones include iOS, Android and BlackBerry).

NOTE

Why do you think Google Analytics has a separate category for tablets, rather than including them under mobile devices?

Device Category	Visits	Pages / Visit	Avg. Visit Duration	% New Visits	Bounce Rate
1. desktop	8,107	1.40	00:01:07	76.22%	76.12%
2. tablet	299	1.32	00:00:58	66.16%	61.47%
3. mobile	15	1.16	00:00:05	100.00%	64.62%

Figure 6. Mobile device categories in Google Analytics.

Now that you know what tracking is, you can use your objectives and KPIs to define what metrics you'll be tracking. You'll then need to analyse these results, and take appropriate actions. Then the testing begins again!

18.6 Analysing data

In order to test the success of your website, you need to remember the TAO of conversion optimisation:

Track – Analyse – Optimise

A number is just a number until you can interpret it. Typically, it is not the raw figures that you will be looking at, but what they tell you about how your users are interacting with your website. Because your web analytics package will never be able to provide you with 100% accurate results, you need to analyse **trends and changes over time** to understand your brand's performance.

18.6.1 Key elements to analyse

Avinash Kaushik, author of *Web Analytics: An Hour a Day*, recommends a three-pronged approach to web analytics:

1. Analysing **behaviour** data infers the intent of a website's visitors. Why are people visiting the website?
2. Analysing **outcomes** metrics shows how many visitors performed the goal actions on a website. Are visitors completing the goals we want them to?
3. A wide range of data tells us about the **user experience**. What are the patterns of user behaviour? How can we influence them so that we achieve our objectives?

NOTE

Google Analytics can send you email alerts whenever something unusual happens on your website. Simply set a triggering condition and decide what sort of report you want to receive. For example, you may want to know if more than a certain number of people have accessed your site in one day – this could mean an opportunity to capitalise on high traffic.

NOTE

Read more about this in the *User Experience Design* chapter.

Behaviour

Web users' behaviour can indicate a lot about their intent. Looking at referral URLs and search terms used to find the website can tell you a great deal about what problems visitors are expecting your site to solve.

NOTE

Analytics data cannot give you a definitive answer to why people behave a certain way. It does provide plenty of clues about intent - it's up to you to put the pieces together.

Some methods to gauge the intent of your visitors include:

- Click density analysis – looking at a heatmap to see where people are clicking on the site and if there are any noteworthy “clumps” of clicks (such as many people clicking on a page element that is not actually a button or link).
- Segmentation – selecting a smaller group of visitors to analyse, based on a shared characteristic (for example, only new visitors, only visitors from France, or only visitors who arrived on the site by clicking on a display advert). This lets you see if particular types of visitors behave differently.
- Behaviour and content metrics – analysing data around user behaviours (e.g. time spent on site, number of pages viewed) can give a lot of insight into how engaging and valuable your website is. Looking at content metrics will show you which pages are the most popular, which pages users leave from most often and more – providing excellent insight for your content marketing strategy, as well as discovering what your audience is really interested in.

A crucial, often-overlooked part of this analysis is internal search. Internal search refers to the searches of the website's content that users perform on the website. While a great deal of time is spent analysing and optimising external search – using search engines to reach the website in question – analysing internal search goes a long way to exposing weaknesses in site navigation, determining how effectively a website is delivering solutions to visitors, and finding gaps in inventory on which a website can capitalise.

For example, consider the keywords a user may use when searching for a hotel website, and keywords they may use when on the website.

Keywords to search for a hotel website may be:

- Cape Town hotel
- Bed and breakfast Cape Town

Once on the website, the user may use the site search function to find out more. Keywords they may use include:

- Table Mountain
- Pets
- Babysitting service

Analytics tools can show what keywords users search for, what pages they visit after searching, and, of course, whether they search again or convert.

Outcomes

At the end of the day, you want people who visit your website to perform an action that increases your revenue. Analysing goals and KPIs indicates where there is room for improvement. Look at user intent to establish if your website meets the users' goals, and if these match with the website goals. Look at user experience to determine how outcomes can be influenced.

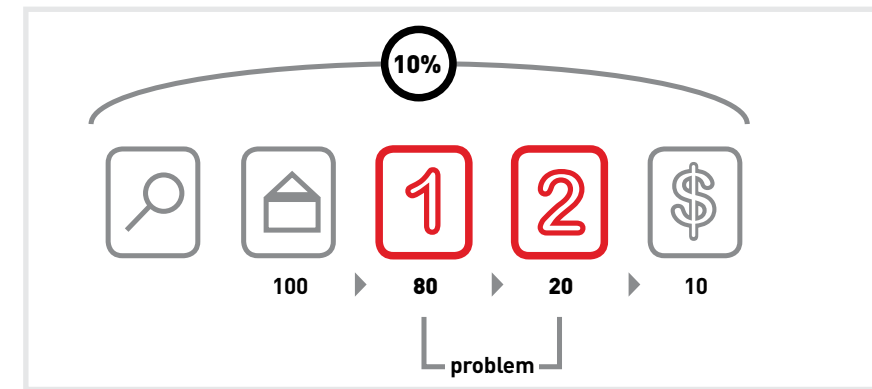


Figure 7. Reviewing conversion paths can give you insight into improving your website.

After performing a search, 100 visitors land on the home page of a website. From there, 80 visitors visit the first page towards the goal. This event has an 80% conversion rate. 20 visitors take the next step. This event has a 25% conversion rate. 10 visitors convert into paying customers. This event has a 50% conversion rate. The conversion rate of all visitors who performed the search is 10%, but breaking this up into events lets us analyse and improve the conversion rate of each event.

User experience

In order to determine the factors that influence user experience, you must test and determine the patterns of user behaviour. Understanding why users behave in a certain way on your website will show you how that behaviour can be influenced to improve your outcomes. This is covered in the next chapter on *Conversion Optimisation*.

NOTE

Read more about this in the *Conversion Optimisation* chapter.

18.6.2 Segmentation

Every visitor to a website is different, but there are some ways in which we can characterise groups of users, and analyse metrics for each group. This is called segmentation.

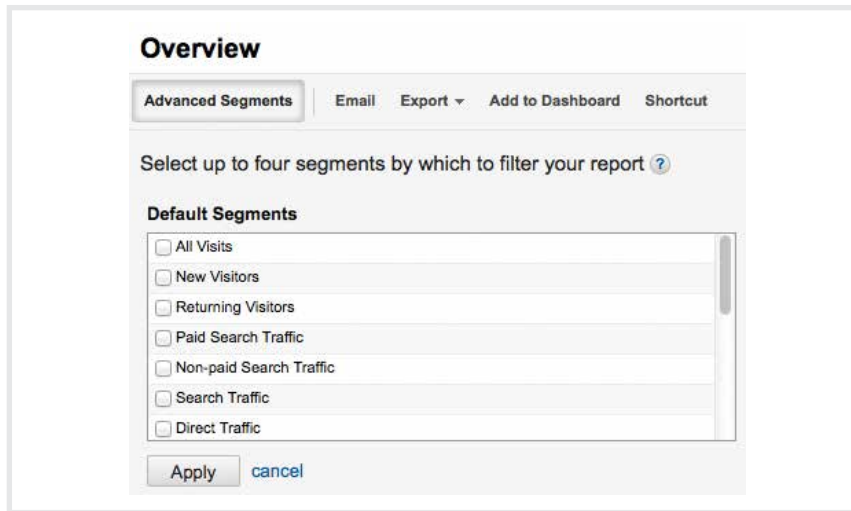


Figure 8. Default segments in Google Analytics.

Some segments include:

Referral source

Users who arrive at your site via search engines, those who type in the URL directly, and those who come from a link in an online news article are all likely to behave differently. As well as conversion rates, click path and exit pages are important metrics to consider. Consider the page that these visitors enter your website from – can anything be done to improve their experience?

NOTE

Landing pages

Users who enter your website through different pages can behave very differently. What can you do to affect the page on which they are landing, or what elements of the landing page can be changed to influence outcomes?

Connection speed, operating system, browser

Consider the effects of technology on the behaviour of your users. A high bounce rate for low-bandwidth users, for example, could indicate that your site is taking too long to load. Visitors who use open source technology may expect different things from your website to other visitors. Different browsers may show your website differently – how does this affect these visitors?

Geographical location

Do users from different countries, provinces or towns behave differently on your website? How can you optimise the experience for these different groups?

First-time visitors

How is the click path of a first-time visitor different from that of a returning visitor? What parts of the website are more important to first-time visitors?

18.6.3 In-page heat maps

Software such as Crazy Egg (www.crazyegg.com) can show you exactly where users click on a web page, regardless of whether they are clicking on links or not.



Figure 9. Heat map options offered by CrazyEgg.

It produces information that helps you to know which areas of a website are clickable, but attract few or no clicks, and which areas are not clickable but have users attempting to click there. This can show you what visual clues on your web page influence where your visitors click, and this can be used to optimise the click path of your visitors.

There are many factors that could be preventing your visitors from achieving specific end goals. From the tone of the copy to the colour of the page, everything on your website may affect conversions. Possible factors are often so glaringly obvious that one tends to miss them, or so small that they are dismissed as trivial. Changing one factor may result in other unforeseen consequences and it is vital to ensure that you don't jump to the wrong conclusions.

18.7 Tools of the trade

The first thing you need is a web analytics tool for gathering data. Some are free and some need to be paid for. You will need to determine which package best serves your needs. Bear in mind that it is possible to switch vendors with server-based analysis software without losing historical data, but it is not as easy to do so with cookie-based tracking.

Below are some leading providers:

- Google Analytics (cookie-based tracking) – www.google.com/analytics
- ClickTracks (server-based and cookie-based tracking) – www.clicktracks.com
- AWStats (server-based tracking) – awstats.sourceforge.net
- Webalizer (server-based tracking) – www.mrunix.net/webalizer
- SiteCatalyst – sitecatalyst.omniture.com/login

NOTE

Read more about this in the *Conversion Optimisation* chapter.

When it comes to running split tests, if you don't have the technical capacity to run these in-house, there are some third-party services that can host them for you. Content Experiments is a built-in feature of Google Analytics that lets you run split tests quickly and easily, and even helps you to figure out whether your results are statistically significant.



Figure 10. Content Experiments allows you to test different versions of key web pages.

A basic split test calculator is available at www.usereffect.com/split-test-calculator.

When you use cookie-based tracking, you need to add code tags to your web pages – and these need to be maintained, updated and changed occasionally. Google Tag Manager (www.google.com/tagmanager) makes it easy to add and work with these tags without requiring any coding knowledge. Other professional tag management tools include TagMan (www.tagman.com), Ensignten (www.ensighten.com) and Tealium (www.tealium.com).

18.8 Advantages and challenges

Tracking, analysing and optimising is vital to the success of all marketing efforts. Digital marketing allows easy and fast tracking, and the ability to optimise frequently. And when you use real data to make decisions, you're likely to make the best choices for your business and website.

However, it can be easy to become fixated on figures and metrics, instead of looking at broader trends and using them to optimise campaigns. Generally, macro or global metrics should be looked at before analysing micro elements of a website.

Testing variables is vital to success. Results always need to be statistically analysed, and marketers should let these numbers make the decisions. Never assume the outcome – wait for the numbers to inform you. The next chapter covers this in much more detail.

NOTE

Read more about this in the *Conversion Optimisation* chapter.

18.9 Case study: Motoreasy

18.9.1 One-line summary

Motoreasy puts their broad marketing activities to good use by improving the conversion rate on their website and increasing business four-fold.

18.9.2 The problem

Motoreasy offers extended warranties for cars, and sells these online and through their sales team. They identified two main objectives for their website. They needed prospective customers either to purchase a warranty online or to fill in a contact form so that the sales team could contact them. Motoreasy already had a comprehensive marketing strategy consisting of SEO, search advertising, an affiliate programme, content marketing, TV and print advertising, direct mail and PR. They did not want to change their marketing strategy, but rather wanted help to improve the performance of their website. They felt that more of the traffic being brought in by their marketing activities could be converted to a successful sale.

The conversion process involved two steps:

1. The first part involved website visitors getting a quote for an extended car warranty. The user needed to fill out three short forms to get a quote (this level of information is required as the product is financially regulated and has strict legal guidelines). For every three users who began the process, only one completed it.
2. After that, if the visitor was happy with the quotes, there were another three short forms to complete in order to sign up and pay for the product.

18.9.3 The solution

The best way to get more visitors to complete website objectives is to look at where in the conversion funnel people are dropping off and abandoning the process – and then fix this.

When the analysts looked at the conversion funnel, the trend they discovered was that visitors were lost at each point. A close inspection of the forms themselves revealed that the language was quite formal. While the benefits of the product were mentioned up front, these were not reinforced further along in this information gathering process.

In the second part of the process, visitors needed to sign up and enter credit card information to complete the process. As with the quote process, marketing messages outlining the benefits of the product were also absent along this part of the conversion funnel. And once they had completed the first part of the process successfully, the same marketing messages were used to motivate them to complete the second part.

The design was reworked so that the marketing message, crafted to motivate visitors to complete the process, was consistently communicated. The most important information was placed in the top-right position on the page, where most of the visitor's attention is focused. The benefits were clearly laid out on the form, and the terms and conditions were placed at the bottom of the page.

For visitors who had started the process, but had become frustrated, the company's phone number was placed clearly at the top of the page, and a short contact form was also provided to save any information that had already been entered.

18.9.4 The results

Once these changes were implemented, the dropout rate for the first part of the process fell from 65% to 29%. This is impressive, since the average dropout rate online is 40%. Of those who left the page while completing a request for a quote, more than half phoned in to complete the process or completed the shorter version of the contact form.

Before the changes, 31% of visitors completed the second process; after the changes, this number rose to 69% – the number of people submitting their credit card information had doubled. With minimal spend and no change to their marketing strategy, Motoreasy managed to grow their business four-fold.

The business benefited from key marketing insights gained from looking at Motoreasy's conversion funnel. These were:

- Looking at the drop-off rate at each stage in the conversion funnel was important to identify problems.
- A high drop-off rate across the conversion funnel could highlight a general problem with the process itself, in this case the content of the forms themselves (the benefits were not being reinforced at each stage and key information was not being placed where the visitor was most likely to see it).
- It was important to direct visitors by spelling out the action they should complete while clearly and consistently communicating the benefits of doing so. This would motivate them to complete the conversion funnel (Dainow, n.d.).

18.10 The bigger picture

Tracking, analysing and optimising are fundamental to any digital marketing activity, and it is possible to track almost every detail of any campaign.

Most analytics packages can be used across all digital marketing activities, allowing for an integrated approach to determining the success of campaigns. While it is important to analyse each campaign on its own merits, the Internet allows for a holistic approach to these activities. The savvy marketer will be able to see how campaigns affect and enhance each other.

The data gathered and analysed can provide insights into the following fields, among others:

- **SEO** – what keywords are people using to search for your site, and how do they behave once they find it?
- **Email** – when is the best time to send an email newsletter? Are people clicking on the links in the newsletter and converting on your website?
- **Paid media** – how successful are your paid advertising campaigns? How does paid traffic compare to organic search traffic?
- **Social media** – is social media driving traffic to the website? How do fans of the brand behave compared to those who do not engage socially?
- **Mobile** – how much of your traffic comes from mobile devices? Is it worth optimising your site for these?

18.11 Summary

The ability to track user behaviour on the Internet allows you to analyse every level of a digital campaign, which should lead to improved results over time.

The foundation of successful web analytics is to determine campaign and business objectives upfront and use these to choose goals and KPIs (grounded in solid targets).

Web analytic packages come in two flavours – server-based and cookie-based tracking – although some packages combine both methods.

Data can be analysed to discover how users behave, whether outcomes have been achieved, and how appealing the user experience is. Testing to optimise user experience can demonstrate ways in which to influence user behaviour so that more successful outcomes can be achieved.

Segmenting the audience allows specific groups of users to be analysed.

18.12 Case study questions

1. What is a conversion funnel?
2. Describe what was done here to ensure that more site visitors did what Motoreasy wanted them to do.
3. How did language play a role in this case study?

18.13 Chapter questions

1. Why is it so important to use data to inform business decisions?
2. What would you learn from a single-page heat map?
3. What is the difference between a goal and a KPI?

18.14 Further reading

www.kaushik.net/avinash – Avinash Kaushik is an analytics evangelist, and his regular insight is essential reading for any digital marketer.

Web Analytics 2.0 by Avinash Kaushik – if you are looking to get started in web analytics, you can't go wrong with this book by the web analytics legend.

www.google.com/analytics/ig.html – Google Analytics Conversion University is an excellent starting point for anyone who wants to get to grips with this free, excellent web analytics service.

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Conversion Optimisation

What's inside: An introduction to the useful world of **Conversion Optimisation**. **Key terms and concepts** are included to help you understand the process, as well as **data collection methods and steps** for improving on the different **digital marketing tactics**. This chapter tells you how to make sure you are getting the most out of your digital marketing investment by **running effective, valuable tests**.

19.1 Introduction

Let's return to a real-world example to help explain what conversion optimisation is. Think of a shoe store. When laying out the store, a lot of care has been taken in determining where to place displays, mirrors, chairs and the till. However, there is no way of easily determining if the layout is the best option.

For example, the till may be at the front of the store. It may be worth testing to see if moving the till to the middle of the store affects sales. Here, this would require tracking sales over a period of time with the till in the front of the store, then shutting down for a few days while the store is reorganised, and then tracking sales with the new layout – all a little impractical.

NOTE

Remember the example from the User Experience Design chapter, where Amazon made an extra \$300 million by changing just one button? This was the result of consistent conversion optimisation.

However, if we have an online store, we can just show slightly (or very) different versions of web pages to visitors, and track how different versions affect sales. We don't need to shut down our website to create new versions, and we can watch the real-time results emerge as hundreds of customers pass through the store. The cycle of tweaking and testing websites in this way is called conversion optimisation. This chapter will take you through the steps in a conversion optimisation process, helping you to understand how to make things work better.

In this chapter, you will learn:

- Which digital marketing tactics you can test and improve
- How to pick the right test for your goals and purpose
- How to perform conversion optimisation step by step to improve the effectiveness of your online marketing efforts

19.2 Key terms and concepts

Term	Definition
A/B test	Also known as a split test, it involves testing two versions of the same page or site to see which performs better.
Ad Server	The technology that places ads on websites.
Call to action	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today, and so on).
Click path	The journey a user takes through a website.

Cookie	A small text file that is used to transfer information between browsers and web servers. They help web servers to provide the right content when it is requested.
Conversion	Completing an action that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Conversion rate	The number of conversions divided by the number of visitors expressed as a percentage.
Funnel	In web analytics or conversion optimisation, an established set of steps a user should take in reaching a goal, such as making a purchase.
Heat map	A data visualisation tool that shows levels of activity on a web page in different colours.
Hypothesis	A statement that is being tested.
Landing page	The first page a visitor sees on a site. Usually it is specific to a campaign being run.
Micro-conversion	A small conversion in the path to a conversion, such as going from step 1 to step 2 in a checkout process.
Multivariate test	Testing combinations of versions of the website to see which combination performs better.
Null hypothesis	The default or general position, usually where no difference is the hypothesis.
Split test	Also known as an A/B test.

19.3 What can you test?

The short answer: everything! However, there are some good tactics to start testing.

19.3.1 Email marketing

The most obvious place to start testing your email marketing is with subject lines. A simple split test will help you to determine which version of a subject line improves open rate. Within an email, you can test your Call to Action copy to see how you can improve clickthrough rate. Email is also a good medium to test different kinds of offers to see how they influence sales. These can be combined with testing different types of content: long copy versus short copy, or images versus video.

You can also test delivery days and times for your email, either with a split test or by testing with your whole group at different times of the year.

19.3.2 Display and search advertising

There are many different conversion points you may want to test with advertising. You can test to see how different adverts may improve clickthrough rate, or you can test to see how different adverts affect the conversion rate of the traffic coming to your website.

Different Calls to Action in the adverts can be tested, as well as different headlines. When it comes to display advertising, completely different versions of banner adverts can be tested.

NOTE

Improving your search ads can increase your Quality Score, meaning your ad ranks higher and you pay less for clicks.

Most Ad Servers, including MediaMind (www.mediamind.com) and Google's AdWords, have built-in testing. This means that no additional code is required in order to run tests. In most cases, the Ad Server will also serve adverts based on the results of the test, so that the better-performing advert is given preference over time.

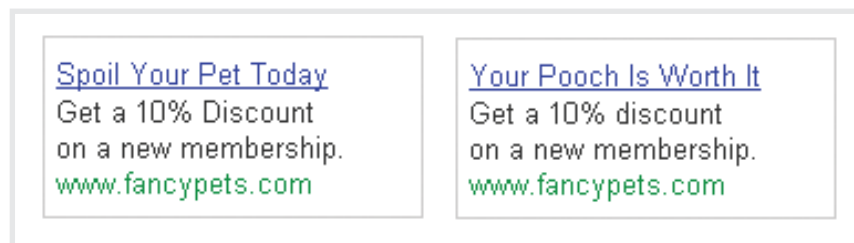


Figure 1. Two search ads with different headlines.

19.3.3 Social media

If you are broadcasting or distributing messages via social media, you should test your messages to see which perform better. Usually, you will be testing to see how you can increase engagement, whether that's replying to messages, liking Facebook posts, retweeting posts shared on Twitter, or clicking through on links shared.

Types of messages can be tested to see which increase interactions: some options to try are direct questions, shared links, overt requests to take an action, or other messages to generate engagement. Types of media can be tested, like images versus video. Time of day or day of the week can also be tested, to see how these affect interactions.



Figure 2. What kinds of social media posts make the biggest impact on your followers?

It can be trickier to test social media messages scientifically, as the environment is more difficult to control.

19.3.4 Landing pages

A landing page is the first page a visitor sees on a website. In some web analytics packages, it is referred to as an entrance page. Any page of your website could be a landing page, especially if people are coming to your website via search engines. However, when you are running online campaigns that utilise tactics such as email marketing or online advertising, you often send visitors to a specific landing page.

Because you choose the page that visitors see first, you have an opportunity to craft a page that converts. There are many things you can test on landing pages:

- **Heading:** different headings can make your visitors behave differently.
- **Copy:** style, tone, layout and length of copy can all be tested, as well as things like the font size.
- **Call to Action:** different Calls to Action could increase actions.
- **Colour:** test the colours of buttons – green and red are two common choices to try.
- **Images:** different images can have an impact on conversions.
- **Offer:** don't forget, you can also test different types of offers on a landing page or word the same offer differently.

NOTE

Your landing page does not have to be your home page.

19.3.5 eCommerce

There are many things you can test on eCommerce websites, but the most obvious are to test your product pages and your checkout process. With eCommerce, you are usually testing to increase your conversion rate (more people buy from you) or to increase your basket size (people buy more from you). As your testing becomes more sophisticated, you will hopefully be achieving both.

On product pages, you should be testing to see how you might encourage users to start the purchasing process. Some things to test include:

- **Images:** images of different sizes, or entirely different image content, could make a big difference.
- **Call to Action:** “Add to cart” or “Buy now” may affect shopper behaviour.
- **Shipping information:** test to see whether displaying shipping costs before actual checkout affects the volume of customers starting the checkout process, as well as its effect on completing the purchase.
- **Credibility information:** do ‘secure shopping’ badges affect conversion rate?

NOTE

Also consider your mobile shoppers - how can you optimise their experience?

Product pages are also a good place to test how you might increase basket size. You can test displaying complementary or similar products. If you spend time on Amazon, you'll see that they display items that customers bought together, suggesting you should do the same.



Figure 3. Amazon recommends items based on past purchases and site usage.

The checkout process is incredibly important to test. Often, an online purchase takes place over several screens, or steps. Instead of looking at the overall conversion rate, you should be looking at the conversion rate between steps. This is referred to as funnel analysis.

If possible, you should test a single-page checkout versus the multi-page approach. Test credibility and reassurance statements in the checkout process. Font size can also have an effect on conversions.

The above should give you an idea of where you can start with your conversion optimisation, but it is by no means an exhaustive list.

19.4 Designing tests

In order to design tests successfully, you need to know what you can test, how you can test, and what sort of time periods you are looking at for testing. If it's your first time doing conversion optimisation, you should start with simple and quick tests in order to get a feel for the process before embarking on more complicated tests.

19.4.1 Types of tests

When we talk about conversion rate optimisation, we are usually referring to running split tests. A split test is one where we show different versions of a web page to groups of users and determine which one has performed better.

We can run **A/B tests**. Here each version being tested is different from all the others. A/B tests often involve just two versions being tested: the original and an alternative. There can also be many alternatives being tested.

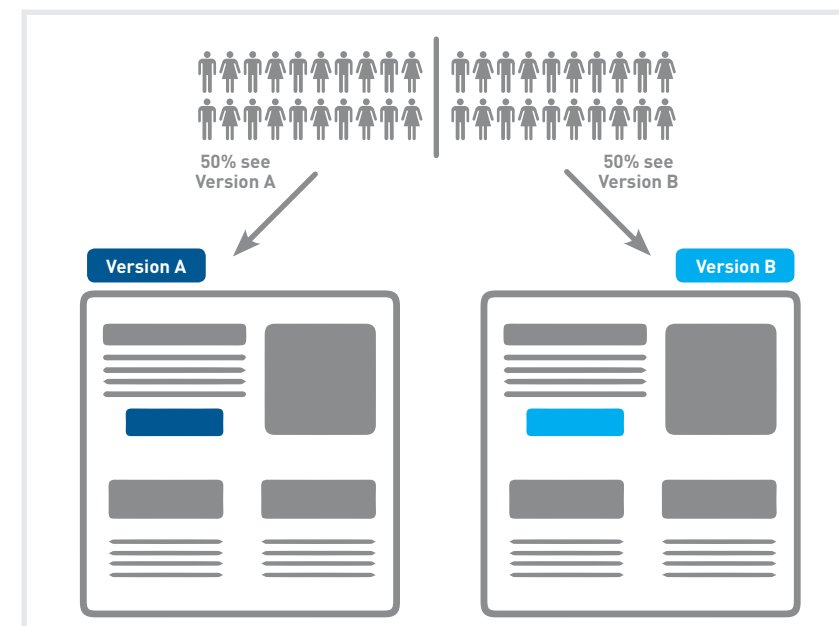


Figure 4. A/B testing explained.

A/B tests are ideal for an initial foray into conversion optimisation, as they can be easy to set up. If you are running just one alternate and the original, it can also mean that you get a quicker result.

When conducting A/B testing, you should only change one element at a time so that you can easily isolate which factors have an impact on your conversion rate.

We can also run **multivariate tests** (sometimes referred to as MVTs). Here, a number of elements on a page are tested to determine which combination gives the best results. For example, we may test alternative headlines, alternative copy and alternative Call to Action buttons. Two versions of three elements means that we are testing eight combinations!

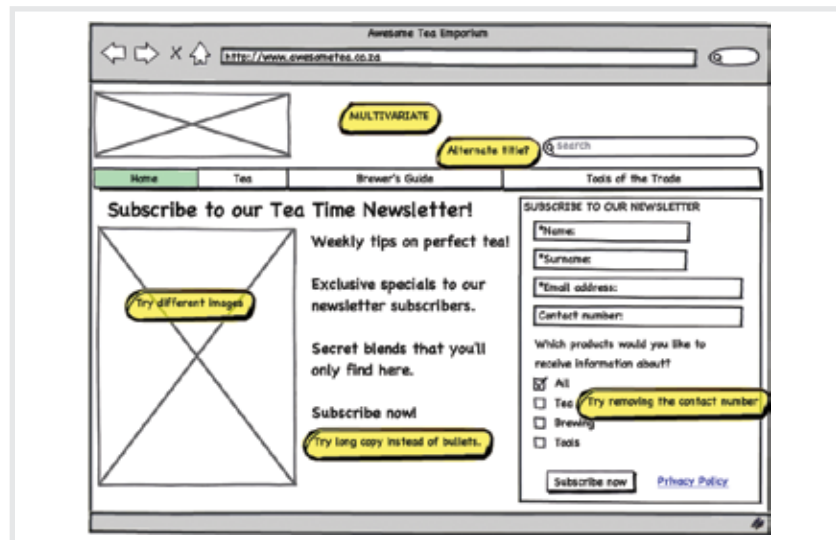


Figure 5. Multivariate testing combines a variety of elements.

Multivariate tests can be more complicated to set up, but allow you to test more elements at once. Multivariate tests are ideal when you have large traffic volumes.

If traffic volumes are not very high, it can take a very long time to reach a statistically significant result, especially if there are many combinations being tested.

19.4.2 Length of tests and sample size

There are several factors that determine which tests you can run. Relatively simple calculations help you to determine how long a test is likely to take, which is based on the number of participants as well as the improvement in conversion rate. We've included some sample size calculators in the Tools of the Trade section of this chapter.

Number of participants

The number of participants in the test is determined by how many people actually see the page being tested, as well as what percentage of your potential customers you want to include in your test.

The number of people who see the page being tested may not be the same as the number of visitors to your website. You'll need to use your data analytics to determine the number of people viewing that specific page. Of course, if you are running advertising campaigns to direct traffic to the page being tested, you can always spend a bit more money to increase the number of people coming to that page.

You also want to determine what percentage of people will be involved in the test. In a simple A/B test, if you include 100% of your visitors in the test, 50% will see version A and 50% will see version B. If you include only 50% of your visitors, 25% of your overall visitors will see version A, and 25% will see version B. Including 100% of your visitors will give you results more quickly. However, you may be concerned that your alternative version could perform worse, and you don't want to compromise your performance too much.

NOTE

For sites with lots of traffic, limit your test to about 10% of visitors.

Change in conversion rate

While this is not something you will know upfront, the percentage change in conversion rate also affects the length of a test. The greater the change, the more quickly a statistically significant decision can be made.

Number of variations

The more variations you have, the longer it will take to determine which combination performs the best.

These factors can then be used to calculate the suggested length of time for a test to run. There are several online calculators that do this for you. A good one to try is this one, offered by Visual Website Optimizer: <http://visualwebsiteoptimizer.com/ab-split-test-duration/>.

Estimate Test Duration	Scenario 1	Scenario 2	Scenario 3	Scenario 4
# Test combinations	2	2	2	3
# Page views per day	200	200	300	350
% Visitors in experiment	100	100	50	50
% Current conversion rate	30	30	30	30
% Expected improvement	20	40	20	30
Days Duration	4.01	1.04	5.35	4.22

Figure 6. Small changes can affect your online testing.

It is usually preferable to test bigger changes or variations, rather than very small changes, unless you have a very large audience.

19.5 Step-by-step guide to conversion optimisation

Proper planning is important to achieving success with your conversion optimisation. Whatever the outcome of your test, if you've planned and documented carefully, you'll always learn something.

The basic approach to conversion optimisation is:

1. Gather data
2. Analyse data
3. Fix anything that's broken
4. Design tests
5. Run tests
6. Report and repeat

19.5.1 Gather data

The very first step is to gather data about the site you are testing so that you can make smart decisions about what to test and how. There are many sources that can be used, depending on the nature of the site that you are testing. Of course, you also need to know the business for which you are testing: what do you want website visitors to do?

NOTE

Read more about this in the *Data Analytics* chapter.

- **Analytics data:** existing web analytics data can be used to determine which pages in your site should be tested. You can also gather data about particular pages on your site using tools such as Crazy Egg (www.crazyegg.com) or ClickTale (www.clicktale.com).
- **User data:** user labs or simple site surveys (www.kissmetrics.com) is a useful tool for these) can also be used to add qualitative data to the quantitative data gathered using web analytics tools.



Figure 7. Tools such as KISSmetrics offer a range of web analytics features.

- **Customer service data:** if you are running tests for a site where users also speak to customer service, you can gather data about the site from customer service representatives. They should have information on common reasons why visitors make a phone call. Your CRM system may also hold some valuable data.

NOTE

Read more about this in the *Customer Relationship Management* chapter.

19.5.2 Analyse

Having gathered data, you need to analyse it intelligently so that you can start designing tests.

There are some key questions that you need to answer at this stage.

What should people be doing on the site?

This is where you look at the actual conversion. Usually, this is an action taken by a user that increases revenue for a business. There are obvious conversions to look at: placing an order or completing a lead generation form, for example. However, it can also be useful to understand less obvious conversions, or micro-conversions.

You could run a test to see what would reduce the bounce rate of a page. The aim of an online bookstore is to sell books, but they could also test to increase newsletter signups, and focus on selling books later. Micro-conversions can also refer to the path to conversion. Often, there are established steps a visitor should take in the conversion process. Conversion optimisation can look at each step. The Visitor Flow report in Google Analytics can be a great help in providing this insight.

NOTE

You can find the *Visitor Flow* report in Google Analytics in the *Audience* section.

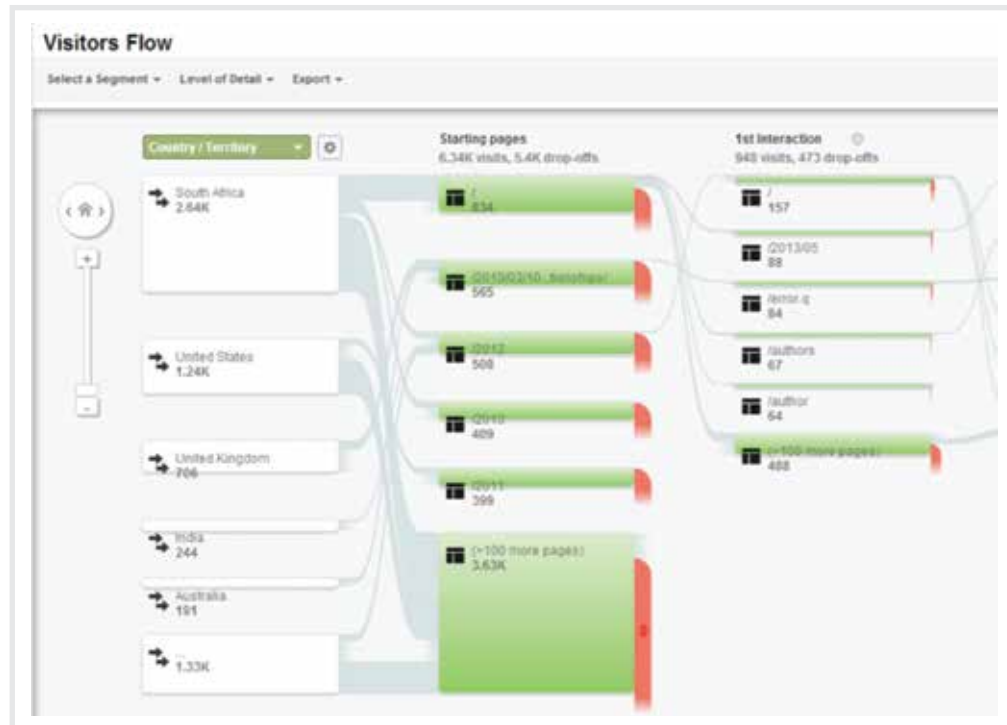


Figure 8. Visitor flows in Google Analytics.

Knowing what actions or conversions you are testing is about knowing the business and its website well.

Who is coming to the site, and why?

To understand who is coming to the website, and why, you need to look at data that tells you about your visitors and about how they got to your website.

Visitor information includes their location and richer demographic information (such as age and income), if available. Another key point to look at is the type of device they use – desktop, tablet or mobile phone, for example.

To understand why these visitors come to your website, you need to be able to analyse your sources of traffic. The search keywords sending you traffic should tell you something about the intent of your visitors, for example.

What are they doing on your site?

Of course, now you need to understand what your visitors are doing, and why they're not doing what you want them to do. Here you need to look at metrics such as bounce rate and exit rate for important pages. As well as examining your overall conversion rate, look at the steps in the process and see where those drop offs occur.

Look at which page is the most visited landing page, especially as this may not be the home page. Look to see which pages are exit pages, and determine if those should be the last pages a user sees on your site. You can use internal site search information to see if visitors are looking for particular information on your website.

19.5.3 Fix anything that's broken

As part of your analysis, you may have identified problems that can be fixed without testing. Before you carry on, fix these! You should also try to understand if there is traffic coming to your site that is not relevant, and try to segment that traffic from your calculations.

For example, if you have a beautifully designed website that sells custom couches, but is featured in a website design gallery, you may get a lot of traffic that is coming only to look at your site, and not to buy couches.

19.5.4 Design tests

By now you should know what areas of your site need testing, so it's time to design tests.

Establish the starting point (called the null hypothesis), the alternatives and the expected outcome, and get testing!

19.5.5 Run tests

Implement the tracking code needed to run your tests. Most testing software uses cookies to ensure that return visitors see the same version of the test they saw initially. You will also need to put tracking code on your conversion page. Before taking your test live, test to make sure that the tracking code does not conflict with any other code on your website.

If everything checks out, take your test live, and wait for the data to be collected. Check in regularly to see how the test is proceeding, and wait for a statistically significant outcome.

19.5.6 Report and repeat

When you have a result, it's time to report on it. Refer back to your null hypothesis to determine if the outcome was as expected. In your report, you should include why things went as expected, or why not.

Implement the better-performing solution, and plan your next test. There is always something you can improve.

NOTE

What happens if there is no result? Sometimes there is no change in the conversion rate, or the change is so small it is not statistically significant. Try testing something more dramatic, or try to send more traffic to the page in question. If what you tested made no difference, that's still valuable information: the people visiting your site clearly don't respond to what you thought was important. That's a great opportunity to find out what is really important!

19.6 Tools of the trade

Online, conversion optimisation relies on being able to record which version of a test a web visitor sees, and whether or not that visitor converted. A returning visitor should also see the same version they saw the first time to avoid confusion. There are many software solutions that help you to do this.

Google Analytics includes a feature called Content Experiments, which is a built-in A/B testing tool. It automates a lot of the process of setting up and running your test, reports back on statistically significant results, and suggests how long the test should run. It even adjusts how pages are served to groups of visitors – if version A is doing much better than version B, for example, it will slowly decrease the number of people being exposed to version B. You can find Content Experiments directly in Google Analytics: www.google.com/analytics

There are many split test calculators online that help you to determine the significance of split tests if you are running them yourself. www.usereffect.com/split-test-calculator and abtester.com/calculator are just two options.

ClickTale is a web analytics tool that helps you to visualise how particular pages are performing by showing heat maps of mouse movements and clicks on a page. It also offers form analysis, showing how particular form fields may be affecting completion rate: www.clicktale.com

19.7 Case study – Quirk Education

19.7.1 One-line summary

Quirk Education uses split testing to maximise their conversion rate, attracting more sign-ups for their online eMarketing courses.

19.7.2 The problem

Quirk Education is a specialist online educator that offers digital marketing courses to students around the world. The target audience includes current and aspiring digital marketers in all industries, as well as business people and professionals in related fields such as PR, creative industries and management.

For Quirk Education, the most important conversion page is the course details page. This is where visitors can sign up for a course or download a course info pack. It is the core of Quirk Education's online efforts.

While conversions were coming in, Quirk Education needed to maximise their conversion rate to get as many course registrations as possible.

19.7.3 The solution

The analytics team took up the challenge to improve the conversion rate on a course page with minimal effort and expense. They understood that a well-placed picture or a splash of colour could be the difference between someone clicking on through the site, or leaving without a second thought. A/B testing allowed them to determine which images would have the best results.

Google has made split testing much easier by introducing Google Content Experiments – a tool that combines split testing with other analytics within the usual Google Analytics interface. Google Content Experiments was used to test a simple image swap to discover whether changing one image on the course information page would increase the conversion rate on that page.

The original pages featured a photo of a smiling student; the test page replaced that student with the Digital Media and Marketing Association (DMMA) logo. The DMMA is a South African body that represents the digital marketing profession and also endorses the courses provided by Quirk Education.

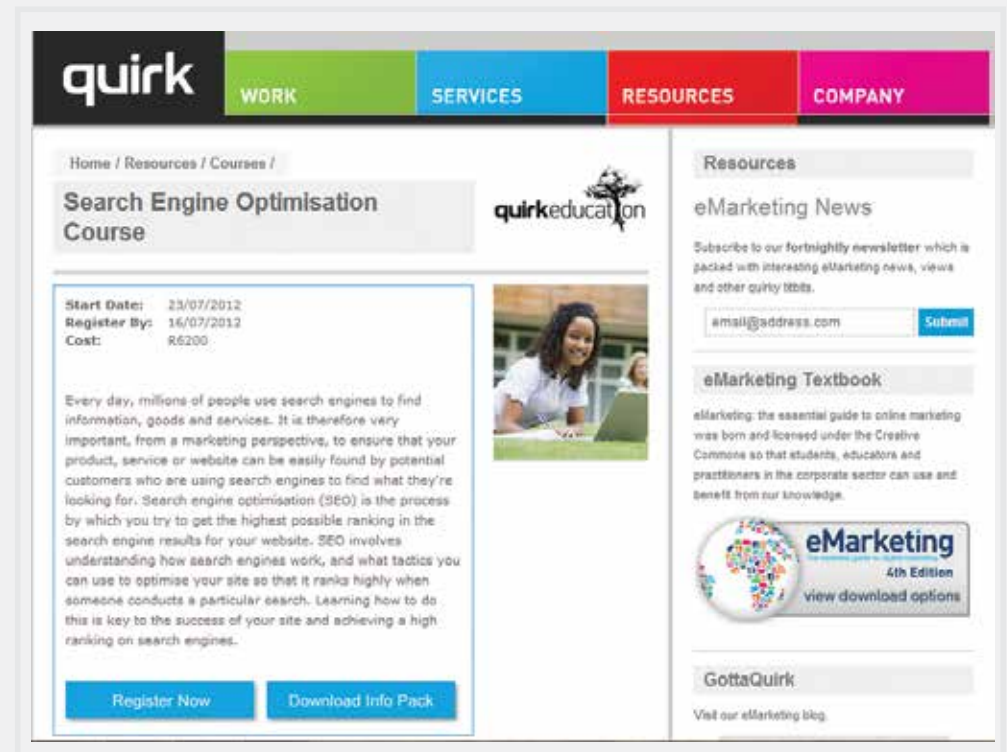


Figure 9. Original version: Smiling student (this is what the website looked like at the time of this case study).

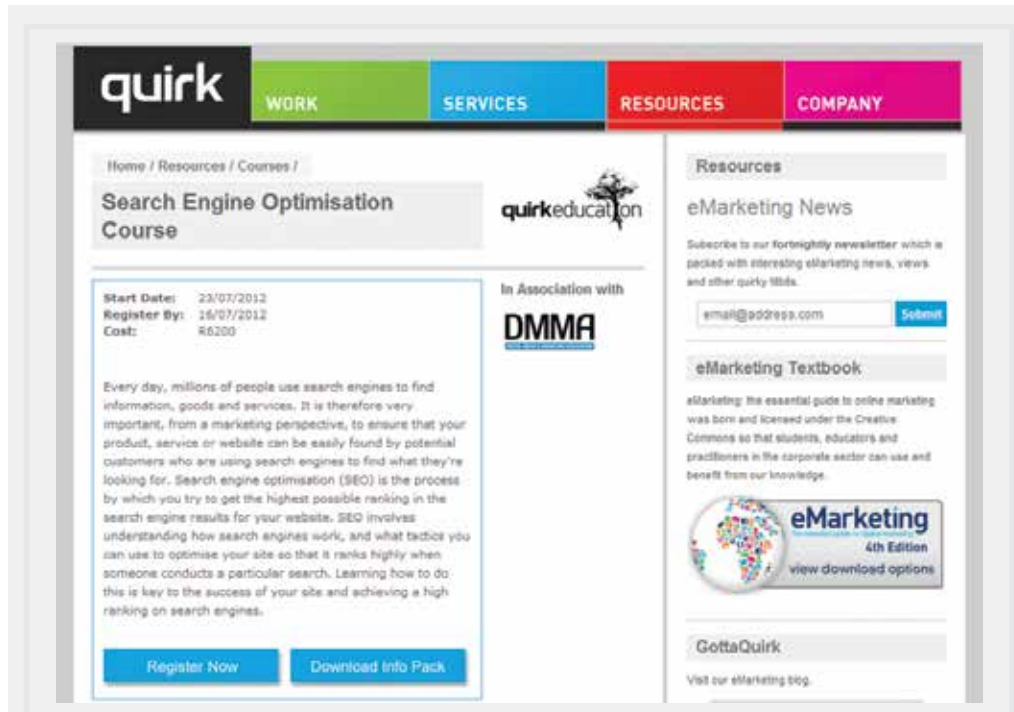


Figure 10. Variation page: DMMA logo.

Two different test pages – one with an image of the woman, and the other with an image of a DMMA logo – were created for each of these four courses:

- Digital Marketing course
- Search Engine Optimisation course
- Writing for Digital course
- Social Media course

After these pages were created, a few lines of tracking code were implemented on the variation pages. The Google Content Experiments code then served the different versions to different people (taking care to ensure that each visitor would only ever see one version to avoid confusion) and recorded the results.

19.7.4 The results

The pages with the DMMA logo received a 3.69% conversion rate, compared with a 1.29% conversion rate for pages with the image of the student. Of course, the results don't indicate why the visitors who were served the DMMA logo were more inclined to convert. One can infer that the logo of a well-known digital marketing body lent an additional level of credibility to the Quirk Education offering (Makoma, 2012).

19.8 The bigger picture

As you've seen at the start of this chapter, conversion optimisation applies to just about every part of your digital marketing strategy. Almost any tactic can be tweaked, tested and improved – in fact, this is best practice and highly recommended.

Conversion optimisation also speaks to a bigger consideration about keeping your channels up to date in the ever-changing online marketing space. Keeping things fresh and constantly improving is the way to go. Not only does this entice your customer, it also reflects on your bottom line – making valuable, incremental improvements increases your earnings in the short term, and decreases the need for radical changes over time.

19.9 Chapter summary

Conversion optimisation is the process of testing to increase the conversions from a website or digital campaign. A conversion can refer to any action that a web visitor takes.

Tests are either A/B tests, or multivariate tests. It's important to understand the business and customers, so you can create appropriate, useful tests.

The basic approach to conversion optimisation is:

1. Gather data
2. Analyse data
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6. Report and repeat

19.10 Case study questions

1. Why can an image make such a difference to someone's online experience?
2. Why was testing important in this case?
3. Discuss why the one image led to more conversions than the other.

19.11 Chapter questions

1. Describe a situation where an A/B test would be more suited as a data-gathering method than a multivariate test.
2. What is a conversion rate, and why is it so important to marketers?
3. What can you test on an eCommerce product page? List three examples.

19.12 Further reading

www.grokdotcom.com – FutureNow's GrokDotCom offers commentary, case studies and conversion optimisation best practice.

www.whichtestwon.com – Anne Holland's *Which Test Won* shows case studies where you can guess the result, and compare your prowess to that of other visitors.

Always Be Testing: The Complete Guide to Google Website Optimizer by Bryan Eisenberg, John Quarto-von Tivadar and Lisa T. Davis

19.13 References

Makoma, S. L., 2012. *Google's New Content Experiments Tool: A Case Study* [Online]
Available at: <http://www.gottaquirk.com/2012/08/29/googles-new-content-experiments-tool-a-case-study/>
[Accessed 2 October 2013].

20

Appendix:
Understanding
the Internet

There is no doubt about it: the Internet has changed the world we live in. Never before has it been so easy to access information, communicate with people all over the globe, and share articles, videos, photos and all manner of media.

The Internet has led to an increasingly connected communications environment, and the growth of Internet usage has resulted in declining distribution of traditional media such as television, radio, newspapers and magazines.

Digital marketing embraces a wide range of strategies, but what underpins its success is a user-centric and cohesive approach.

Over the past few decades, marketers have begun to wake up to the power of the Internet, both as a platform for communication and as a way of tracking conversations.

By its very nature, the Internet is a network of interlinking nodes. Marketers use these nodes to track conversations and behaviour patterns.

20.1 History of the Internet

1958	US ARPA (Advanced Research Projects Agency) established to lead science and military technological developments.
1961	MIT research paper on Packet Switching Theory.
1961-69	Ongoing research into inter-computer communications and networks.
1969	ARPANET, commissioned by US Defense Department, goes live. US universities connect up network facilities for the first time.
1971	Ray Tomlinson creates first network email application.
1973	Development of protocols to enable multi-network Internet opportunities. First international ARPANET connections made.
1976	HM Queen Elizabeth II sends an email.
1978	First spam email is recorded.
1980	Tim Berners-Lee develops rules for the World Wide Web and is credited as the Web Father. Alan Emtage develops the first search tool, known as 'ARCHIE'.
1982	Standard network protocols are established: Transmission Control Protocol (TCP) and Internet Protocol (IP), commonly referred to as TCP/IP.
1984	Joint Academic Network (JANET) is established, linking higher education institutions. Domain Name System (DNS) is introduced.

1985	A company named Symbolics becomes the first registered dot-com domain.
1987	National Science Foundation (US) is the catalyst for the surge in funded work into the Internet. Number of Internet hosts increases significantly in this period.
1988-90	28 countries sign up to hook up to the NSFNET, reinforcing international Internet potential.
1990	Senator Al Gore coins the term 'information superhighway'.
1991	Web Father Tim Berners-Lee releases World Wide Web (www) with scientists from CERN.
1992	America Online (AOL) is launched and raises \$23m in floatation. The term 'surfing the net' is introduced by Jean Armour Polly. The World Bank goes online.
1993	Mainstream media attention increases awareness of the Internet. The first Internet publication, Wired, goes on sale. Mosaic introduces the first web browser with graphical interface and is the forerunner of Netscape Navigator. First online shopping malls and virtual banks emerge, as does evidence of spam. First clickable banner advert is sold by Global Network Navigator to a law firm.
1995	Amazon is launched by Jeff Bezos. Trial dial-up systems such as AOL and CompuServe launch. Charging is introduced for domain names. Search technology companies such as Alta Vista, Infoseek, Excite and Metacrawler rapidly appear.
1996	Yahoo! is launched on the stock exchange and shares are up nearly 300% on first day.
1997	MP3.com is founded. The term 'search engine optimisation' is used for the first time in a forum.
1998	XML is released to enable compatibility between different computer systems. Google founded by Larry Page and Sergey Brin.
1999	Peter Merholz coins the word 'blog'.
2000	AOL and Time-Warner announce that they are merging. Pay-per-click campaigns are introduced for top ten search rankings. Google AdWords launches, charging for adverts on a CPM basis.

20.2 How the Internet works

In its simplest form, the Internet is a collection of documents connected by hyperlinks.

A hyperlink is a virtual link from one document on the World Wide Web to another. It includes the Uniform Resource Locator (URL) of the linked-to document, which describes where on the Internet a document is. It is what you enter in the address bar of the browser, because it is the address of that document on the Internet.

A URL provides information to both browsers and people. URLs include domain names that translate to Internet Protocol (IP) addresses. Every website corresponds to an IP address, which is a structured series of dots and numbers indicating where it is physically located. In fact, every device on the network has an IP address.

When you enter a URL into the address bar of a browser, the Domain Name System (DNS) record indicates where the document you are linking to is.

Confused? Look at the domain name and IP address for Quirk's website:

Domain name: www.quirk.biz

IP address: 212.100.243.204

A domain name looks something like this: www.domainname.com.

But a lot more information can be included in this. URLs can carry the following information: subdomain.domain.tld/directory

Domain – the registered domain name of the website.

Subdomain – a domain that is part of a larger domain.

TLD – the top level domain, uppermost in the hierarchy of domain names.

Directory – a folder to organise content.

The **TLD** can indicate the country in which a domain is registered, and can also give information about the nature of the domain.

.com – the most common TLD.

.co.za, .co.uk, .com.au – these TLDs give country information.

.org – used by non-profit organisations.

.gov – used by governments.

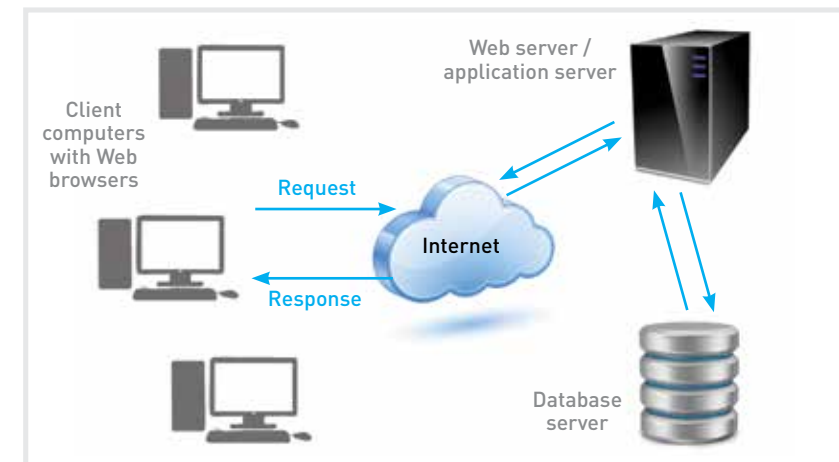
.ac – used by academic institutions.

Domain names must be registered, and there is a fee for doing so.

A website, or any content on the Internet, is **hosted** on a **server**. A web server is a machine that serves web content, and the term often refers to the software (applications) and the hardware (machine) that serve the content.

Very simplistically, it works a little something like this:

1. Someone enters a URL in a browser.
2. This is translated into an IP address, which indicates where the content is located, or where the server for the content is.
3. The server then returns the content requested.
4. The person sees the website that they requested.



NOTE

All of this happens in a fraction of a second!

Figure 2. The process of serving a website.

Sometimes, the server is not able to fulfil the request (it cannot return the content requested), and instead it returns a status code. Two common status codes you will encounter in this book include the below.

- **301:** This is used to indicate that the content requested has moved permanently, and the new version of the content is returned instead. These 301 redirects are often used in search engine optimisation (SEO) or when a new website is launched to make sure that old links are redirected to the correct, new content.
- **404:** This is returned when the content has not been found on the server, either because there was an error in the link, or because the content has been moved or deleted. Website owners can design a custom page for when a 404 error occurs, giving users useful information.

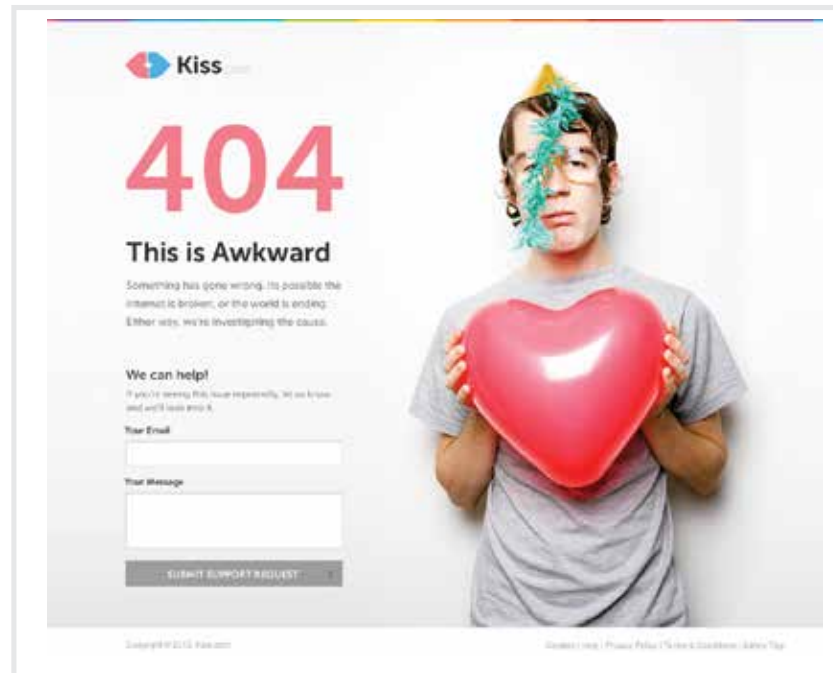


Figure 3. A fun custom 404 page from Kiss.com.

You can find a full list of status codes at www.w3.org/Protocols/rfc2616/rfc2616-sec10.html.

NOTE

How aware are you of security when browsing the web? Pay close attention to the sites that use secure protocols - what does this say about them?

This information can be sent via **Hypertext Transfer Protocol (HTTP)**, or **HTTPS**, which is a combination of HTTP with a secure way of transmitting information. HTTP makes it easy to request and transfer information. It's what makes our websites load, and allows us to connect with people on social networks. However, the information that is transferred is not transferred securely, meaning that it could be viewed by third parties. If this was the only way of sending information online, it would be a bad idea to bank online, or to purchase anything over the Internet. This is why we use HTTPS to encrypt information when it is sensitive. In order to make use of HTTPS, the relevant website needs to get a security certificate, which ensures that various details have been verified by a trusted third party.

If you're unsure, look in the browser address bar to check whether the site you are on is HTTP or HTTPS. Most browsers will indicate a secure site with a little padlock in the address bar, or somewhere else in the browser, to make sure that you know you are in a secure site.

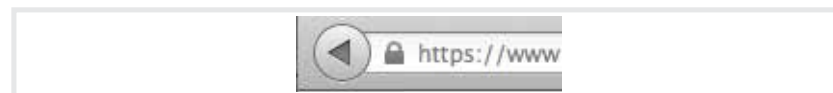


Figure 4. Indicators of a secure site.

20.3 How people access the Internet

People connect to the Internet and access content in many different ways. When it comes to the physical connection to the Internet, the market presents a number of options:

- Dial-up
- 3G connection
- Wi-Fi and WiMAX
- Broadband
- ADSL

The list goes on. The devices people use vary from mobile phones and expensive tablets to personal notebooks and desktop computers. The environment that people are in when they access the Internet also differs:

- At home
- At the office or place of work
- At libraries and education centres
- In Internet cafes and coffee shops
- On the go

Not only do these environmental factors affect how people use the Internet, but their reasons for using the Internet also have an effect on how they interact online.

For some people, the Internet is primarily a communications channel, and their online activity is focused on their email inbox, while for others it may be a research channel, with search engines playing a large role in their online experience.

20.4 What does this have to do with marketing?

Marketing is about conversations, and the Internet facilitates these on a global scale. The rest of this book has covered the tools and tactics you need to understand and use the Internet to its full potential.

20.5 References

Go-Gulf.com, (2012), *Things That Happen On Internet Every Sixty Seconds*. [Image] Available at: <http://www.go-gulf.com/blog/60-seconds/> [Accessed 23 September 2013].

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Last Words

The Internet is a dynamic and exciting environment. It has changed the way we communicate and express ourselves, and it has forced companies and individuals to change the way in which we do business.

With this textbook, you have a solid guide to the tools and tactics of digital marketing. Each of the tactics on its own can do wonders to boost your business, but the best digital marketing strategy comes from an integrated, customer-centric approach.

As marketing geeks the world over will tell you, markets are conversations. The Internet has given customers a platform for responding to the marketing and advertising messages to which they are being exposed, revealing opportunities for companies and brands to engage in two-way conversations instead of one-way broadcasts. It has revealed the declining effectiveness of one-size-fits-all mass communication, and instead allows for cost-effective mass communication.

Owing to the nature of the Internet, digital marketing campaigns are highly trackable and measurable, and can be targeted and customised. Response and awareness can be measured and monitored through online monitoring tools. Companies and customers can use the same social media platforms to express themselves and communicate with each other.

Keeping up to date

NOTE

With the web being so dynamic, we can only ever hope to offer you the foundations for your digital marketing in a printed textbook. Every chapter includes some of the best resources we know of from industry experts who will help you to keep up to date with this exciting medium.

This book is also supported by an online resource centre at www.quirk.biz/emarketingtextbook. That's the first place to look for any updates, as well as more case studies showcasing the techniques outlined in this book.

The QuirkStars regularly blog at www.gottaquirk.com. We have regular tips from our digital marketing strategists, as well as round-ups of some of the best Internet campaigns. And you should definitely sign up for the Quirk newsletter for a fortnightly fix of all the best that there is in the world of digital marketing: www.quirk.biz. You can also follow the QuirkStars on Twitter. Follow Quirk at [www.twitter.com/quirkagency](https://twitter.com/quirkagency), or follow the QuirkStars by using the list at twitter.com/quirkagency/lists/quirkstars.

If you have feedback for us or some unanswered questions, or if you think there is anything we've missed, let us know! You can email us directly on textbook@quirk.biz.

The next step

We hope you're even more enthusiastic about the web than when you began – and now is the time to turn that enthusiasm into action!

Why not start a blog? It's free to start a blog using www.wordpress.com or www.blogger.com. Open a Twitter account for yourself at www.twitter.com. As mentioned earlier, you can follow the QuirkStars to get a taste of what can be found on Twitter, and they'll often retweet or mention other people who are good to follow.

Use what you've learned in order to help out a small business or non-profit organisation. Perhaps set up their first Facebook page, or a simple website using www.withtank.com or www.yola.com. Use Google alerts (www.google.com/alerts) to get an overview of who is talking about your brand (or even about you!).

Go through the chapters and start your own reading list based on the 'Further Reading' sections.

Take your learning a step further, and get a certification that proves how much you know! Google offers certifications for both AdWords (www.google.com/adwords/professionals/individual.html) and Google Analytics (www.conversionuniversity.com).

For a more structured approach, have a look at the courses on offer from Red & Yellow. They offer an ever-evolving and updated knowledge base on digital marketing and communications, and also offer online training courses that can be accessed the world over. You can find these at www.redandyellow.co.za.

Further reading

www.cluetrain.com – the website for the Cluetrain Manifesto, where you can read the entire book at no charge. This seminal work shows how 'markets are conversations'.

www.gottaquirk.com – the blog from the minds of Quirk

[www.twitter.com/quirkagency](https://twitter.com/quirkagency) – Quirk's Twitter account

A/B test	Also known as a split test, it involves testing two versions of the same page or site to see which performs better.
Above the fold	The content that appears on a screen without a user having to scroll.
Accessibility	The degree to which a website is available to users with physical challenges or technical limitations.
Action	A specified task performed by a user, which results in the affiliate being awarded commission. Actions include purchasing a product, signing up for a newsletter or filling in a form.
Active verb	A word that conveys action or behaviour, and in a Call to Action, tells a reader what to do.
Ad Server	The technology that places ads on websites.
Affiliate	The person who markets the products of the merchant. Also called a publisher.
Algorithm	A mathematical, computational or statistical method pre-determined to take a number of variables into account and output a single, quantifiable result that is a function of all the variables. A good example of a commonly used algorithm is the ones used by Google to determine which pages rank more highly on SERPs.
Alt tag	Information that is displayed if an image cannot be displayed; used by search engines to determine what an image is.
Alt Text	The "alt" attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a search engine or user what an image is about and displaying the text in instances where the image is unable to load. Also called Alt Tag.
Analytical CRM	Software that assists a business in building customer relationships and analyses ways to improve them.
Anchor text	The visible, clickable text in a link.
Annotation	A comment or instruction (usually added as text) on a YouTube video. A YouTube annotation may contain links directing users to other pages within YouTube or, if a brand is willing to pay, to outside websites.
App store optimisation (ASO)	The process of optimising mobile and web applications for the specific web stores they are distributed in.
Application	Software that is developed specifically for smartphones and other mobile devices. Also known as an app. There are two types: mobile web apps and native apps.
Backlink	All the links on other pages that will take the user to a specific web page. Each link to that specific page is known as an inbound/backlink. The number of backlinks influences your ranking, so the more backlinks, the better – get linking!
Benefit	The positive outcome for a user that a feature provides.
Blog	A type of website that allows users (bloggers) to post entries on different topics and often allows readers to comment on these posts.
Blogosphere	The world of blogs, bloggers and blog posts.

Bluetooth	A short-distance wireless transfer protocol for connecting devices.
Bookmarking	Saving the web address of a web page so that you can easily refer back to it again. Bookmarks can be managed with a browser, or with an online tool.
Bounce rate	The number of people who view one page and then leave a website without viewing any other pages.
Branding (or visual identity or corporate identity)	How your logo, colours and styling elements are translated from traditional print-based assets to digital.
Breadcrumbs	Links, usually on the top of the page, that indicate where a page is in the hierarchy of the website.
Business to Business (B2B)	When businesses sell products/services to other businesses and not to consumers.
Business to Consumers (B2C)	When businesses sell products/services to consumers.
Call to action (CTA)	A phrase written to motivate the reader to take action (sign up for our newsletter, book car hire today, and so on).
Canonical	The canonical version is the definitive version. In SEO, it refers to a definitive URL.
Caption	Text that appears over a video that labels a scene, identifies a location or person, or narrates dialogue onscreen. Captions can be either open or closed.
Cascading Style Sheets (CSS)	A programming language that defines the styles (fonts, colours, and so on) used to display text and content. Web pages are among the places in which this language is used.
Chiclet	A small icon adjacent to a blog post, article or web page to indicate the availability of an RSS feed, or to allow users to share the information via social media. Named after the gum of the same name because of its unique, pillow-shaped icon.
Click path	The journey a user takes through a website.
Clickthrough	A click on a link that leads to another website.
Clickthrough rate	The total number of clicks on a link divided by the number of times that link was shown, expressed as a percentage.
Cluetrain Manifesto	A set of 95 theses organised as a Call to Action for businesses operating within a newly connected marketplace.
Collaborative CRM	Umbrella term for all the interactive options for serving customers. It is people-based customer support that includes: collaborative browsing, web-based text and voice chat, desktop sharing, application sharing, file transfer, and phone support.
Commission	The bounty paid by a merchant to an affiliate when the affiliate makes a successful referral.
Common page elements	Items that appear on every page of a website.

Common Short Code (CSC)	A special number or code that can be used to address SMS and MMS messages from mobile phones or fixed phones, usually to get something in return.
Community guidelines	The rules and principles that community members must adhere to when communicating on a brand platform.
Content audit	An examination and evaluation of the existing content that a brand publishes.
Content Management System (CMS)	A system that allows an administrator to update the content of a website, so that they do not require a developer to do so.
Content strategy	A plan that outlines what content is needed for a web project and when and how it will be created.
Convention	A common rule or tried-and-tested way in which something is done.
Conversion	Completing an action or actions that the website wants the user to take. Usually a conversion results in revenue for the brand in some way. Conversions include signing up to a newsletter or purchasing a product.
Conversion funnel	A defined path that visitors should take to reach the final objective.
Conversion rate	The number of conversions divided by the number of visitors, expressed as a percentage.
Cookie	A text file sent by a server to a web browser and then sent back unchanged by the browser each time it accesses that server. Cookies are used for authenticating, tracking, and maintaining specific information about users, such as site preferences or the contents of their electronic shopping carts.
Cost per action (CPA)	The amount paid when a certain action is performed by a user.
Cost per click (CPC)	The amount paid when a link is clicked on.
Count	Raw figures captured for data analysis.
Credibility	How trustworthy, safe and legitimate a website looks.
Crowdsourcing	Taking a job traditionally performed by a professional and distributing it to an undefined, generally large group of people in the form of an open call.
Customer	A person who buys or uses goods or services, with whom a company should develop a relationship.
Customer lifetime value (CLV)	The profitability of a customer over their entire relationship with the business.
Customer Relationship Management (CRM)	A strategy for managing a company's relationships with clients and potential clients. It often makes use of technology to automate the sales, marketing, customer service, and technical processes of an organisation.
Customer-centric	Placing the customer at the centre of an organisation's business planning and execution.
Customer-driven	Allowing and encouraging customers to drive the direction of a business.

Data	Statistics and facts collected for analysis.
Data mining	The process of analysing data to discover unknown patterns or connections.
Database	In email marketing, the database is the list of prospects to which emails are sent. It also contains additional information pertinent to the prospects.
Domain name	The easy-to-read name used to identify an IP address of a server that distinguishes it from other systems on the World Wide Web: our domain name is quirk.biz.
Domain Name System (DNS)	DNS converts a domain name into an IP address.
DomainKeys	An email authentication system designed to verify the DNS domain of an email sender and the message integrity.
Double opt-in	The act of getting subscribers to confirm their initial subscription via a follow-up email asking them to validate their address and in that way opt-in again.
dpi	Dots per inch (in an image). On the web, the screen resolution is 72dpi.
Dynamic keyword insertion	In paid search advertising, this allows keywords used in searches to be inserted automatically into advert copy.
Editor	A person who determines the ultimate content of a text, traditionally understood in the newspaper, magazine or publishing industry context.
Email service provider (ESP)	A service that helps you design and send emails.
Embedding	Taking video from an online video provider and posting it elsewhere on the web.
Event	A step a visitor takes in the conversion process.
Feature	A prominent aspect of a product that is beneficial to users.
Flash	A technology used to show video and animation on a website. It can be bandwidth heavy and unfriendly to search engine spiders.
Focus group	A form of qualitative research where people are asked questions in an interactive group setting. From a marketing perspective, it is an important tool for acquiring feedback regarding new products and various topics.
Forum	A website where users can engage in discussions by commenting on threads or previous posts made.
Funnel	In web analytics or conversion optimisation, an established set of steps a user should take in reaching a goal, such as making a purchase.
Geo-targeting	Also known as location-based services. Delivering specific information or content to a user based on their geographic location. Mobile devices can enable this with high precision through features such as GPS and other location-based services.
Goal	The defined action that visitors should perform on a website, or the purpose of the website.

Google AdWords	Google's search advertising program, which allows advertisers to display their adverts on relevant search results and across Google's content network.
Hard bounce	The failed delivery of email communication owing to an undeviating reason, such as a non-existent address.
Heading tags	Heading tags (H1, H2, H3, and so on) are standard elements used to define headings and subheadings on a web page. The number indicates the importance, so H1 tags are viewed by the spiders as being more important than H3 tags. Using target key phrases in your H tags is essential for effective SEO.
Heat map	A data visualisation tool that shows levels of activity on a web page in different colours.
Home page	The first page of any website. The home page gives users a glimpse into what your site is about – very much like the index in a book, or a magazine.
House list	An email database a company generates itself without purchasing or renting names.
HTML5	A broad range of technologies that allow for rich media content and interaction on the scale of Adobe Flash, but unlike its counterpart does not require additional third-party plugins. It allows rich multimedia content to be displayed that can easily be viewed by users, computers and devices. HTML5 is the next iteration of the HTML standard.
Hyperlink	A link in an electronic document that allows you, once you click on it, to follow the link to the relevant web page.
HyperText Markup Language (HTML)	The code language predominantly used to create and display web pages and information online.
Hypothesis	A supposition that is tested in relation to known facts; a proposition based on reason but not necessarily assumed to be true.
iFrame	Stands for inline frame. An HTML structure that contains another document – you can draw information from another website to display, such as with Facebook tabs.
Impression	Each time an advert is shown.
Information architecture	The way data and content are organised, structured and labelled to support usability.
Internet Protocol (IP) Address	An exclusive number that is used to represent every single computer in a network.
Internet Service Provider (ISP)	The company providing you with access to the Internet, e.g. MWEB, AOL, Yahoo.
JavaScript	A popular scripting language. Also used in web analytics for page tagging.
Key Performance Indicator (KPI)	A metric that shows whether an objective is being achieved.
Key phrase	Two or more words that are combined to form a search query – often referred to as keywords. It is usually better to optimise for a phrase rather than a single word.

Keyword	A word found in a search query. For example, searching for "blue widgets" includes the keywords "blue" and "widgets".
Keyword frequency	The number of times a keyword or key phrase appears on a website.
Keyword rankings	Where the keywords or phrases targeted by SEO rank in the search engine results – if your targeted terms do not appear on the first three pages, start worrying.
Keyword stuffing	The process of putting too many keywords into the meta data of the website, or using many irrelevant keywords. Search engines can penalise websites using this practice.
Landing page	The first page a user reaches when clicking on a link in an online marketing campaign. The pages that have the most success are those that match up as closely as possible with the user's expectations.
Lead	A person who has shown interest in a brand, product or service and could be converted into a customer.
Link	A URL embedded on a web page. If you click on the link, you will be taken to that page.
Link bait	A technique for providing content that attracts links from other web pages.
Listening lab	A testing environment where the researcher observes how a customer uses a website or product.
Log file	A text file created on the server each time a click takes place, capturing all activity on the website.
Market share	In strategic management and marketing, the percentage or proportion of the total available market or market segment that is being serviced by a company.
Mass customisation	Tailoring content for many individuals.
Merchant	The owner of the product that is being marketed or promoted.
Meta data	Information that can be entered about a web page and the elements on it to provide context and relevant information to search engines.
Meta tags	Tags that tell search engine spiders what exactly a web page is about. It's important that your meta tags are optimised for the targeted key phrases. Meta tags are made up of meta titles, descriptions and keywords.
Metric	A defined unit of measurement.
Micro-conversion	A small conversion in the path to a conversion, such as going from step 1 to step 2 in a checkout process.
Microblogging	The practice of publishing brief text, image and video updates, usually limited to between 140 and 200 characters.
Model	A strategic visual representation of a process to which a company adheres.

Multimedia Message Service (MMS)	A media-rich extension on SMS, which allows picture, sound or low-quality videos to be sent on a wireless network.
Multivariate test	Testing combinations of versions of the website to see which combination performs better.
Native mobile application	A mobile application designed to run as a program on a specific device or mobile operating system.
Navigation	How a web user uses the user interface to navigate through a website, and the elements that assist in maximising usability.
Null hypothesis	The default or general position, usually implying that where there is no statistical difference, there is no difference between the populations specified in the original hypothesis.
Objective	A desired outcome of a digital marketing campaign.
Observation/online ethnography	When researchers immerse themselves in a particular environment in order to gather insights.
Online reputation management (ORM)	Understanding and influencing the perception of an entity online.
Open rate	The percentage of emails determined as opened out of the total number of emails sent.
Open source	Unlike proprietary software, open-source software makes the source code available so that other developers can build applications for the software, or even improve on the software.
Operational CRM	Entails supporting the "front-office" business processes, which include customer contact (sales, marketing and service).
Opt-in	Giving permission for emails to be sent to you.
Opt-out	Also known as unsubscribe. The act of removing oneself from a list or lists so that specified information is no longer received via email.
Organic results	Also known as natural results. Search results served by the search engine's algorithm. The search engine does not charge website owners to list these results.
Page tag	A piece of JavaScript code embedded on a web page and executed by the browser.
PageRank	Google's secret algorithm for ranking web pages in search engine results pages.
Paid search advertising	Usually refers to advertising on search engines, sometimes called PPC advertising. The advertiser pays only for each click on the advert.
Permalink	A unique URL that points to the permanent location of a single blog post and its associated comments and TrackBacks.
Persona	A character created to define a group of readers in order to speak to them as though they were a unique reader. Usually a hypothetical character created to represent and personify a set of traits.
Primary research	The collection of data to present a new set of findings from original research.

Proprietary software	Any software that one or more intellectual property holders own and license to others in exchange for compensation, subject to certain restrictions. Licensees may not be able to change, share, sell or reverse engineer the software.
Prospect	A potential customer.
Prototype	Interactive wireframes that have been linked together like a website, so that they can be navigated by clicking, scrolling and so on.
QR code	Also known as a 2D barcode. These are scannable barcodes that can be read by certain mobile applications (by taking a photo of the barcode). They contain information such as a URL.
Qualitative data	Data that can be observed but not measured. Deal with descriptions.
Quality Score (QS)	A measure used by Google AdWords to indicate how relevant a keyword is to an ad text and to a user's search query.
Quantitative data	Data that can be measured or defined. Deal with numbers.
Ratio	An interpretation of data captured, usually one metric divided by another.
Really simple syndication (RSS)	RSS allows you to receive updates without requiring you to visit web pages in your browser constantly.
Referrer	When a user clicks on a link from one site to another, the site the user has left is the referrer. Most browsers log the referrer's URL in referrer strings. This information is vital in determining which queries are being used to find specific sites.
Referrer	The URL that originally generated the request for the current page.
Research community	A community set up with the intention of being a source for research.
Research methodology	Methods employed in research for reaching results.
Responsive design	Designing a website so that it changes depending on the device on which it is displayed.
Return on investment (ROI)	The ratio of profit to cost.
Revenue share	Commission structure where the affiliate earns a percentage of a sale.
Robots.txt	A file written and stored in the root directory of a website that restricts the search engine spiders from indexing certain pages of the website.
Sales force automation	A type of program that automates the business task of sales associated with effective implementation, productivity forecasts.
Sample size	The number of respondents in a sample of the population.
Search engine optimisation (SEO)	The process of improving website rankings in search engines.
Search engine results page (SERP)	The actual results returned to the user based on their search query.

Search engine spiders	Programs that travel the web, following links and building up the indexes of search engines.
Search term	The keywords a user enters when searching on a search engine.
Secondary research	The collection of existing research data.
Segmentation	Filtering visitors into distinct groups based on characteristics in order to analyse visits.
Sender alias	The name that is chosen to appear in the sender or from field of an email.
Sender ID	A method used by major ISPs to confirm that an email does originate from the domain that it claims to have been sent from.
Sender policy framework (SPF)	An extension of SMTP that stops email spammers from forging the "From" fields in an email.
Sentiment	The emotion attached to a particular mention – positive, negative or neutral.
Search Engine Results Page (SERP)	The page that shows the results for a search on a search engine.
Session	The period that a user with a unique cookie spends on a website during a specified amount of time.
Short Message Service (SMS)	Text messages that can be sent to mobile phones from the Internet or from other mobile devices. Usually limited to 160 characters.
Simple Mail Transfer Protocol (SMTP)	A protocol for sending messages from one server to another.
Simple Object Access Protocol (SOAP)	A simple XML-based protocol to allow for the exchanging of structured information over HTTP.
Sitemap	On a website, a page that links to every other page in the website, and displays these links organised according to the information hierarchy. In UX terminology, this is the visualised structural plan for how the website's pages will be laid out and organised.
Social media dashboard	A service that allows you to centralise management of your social media properties.
Social network	In the online sense, a type of website model where individual members become part of a broader virtual community.
Soft bounce	The failed delivery of an email owing to a deviating reason, such as an overloaded mail box or a server failure.
Spam	Email sent to someone who has not requested to receive it – EVIL!
Split test	Also known as an A/B test.
Sponsored results	Search engine results that are paid for by the advertiser.
Stakeholder	A person or organisation with an interest in how a resource is managed.

Statistically significant	A sample that is big enough to represent valid conclusions.
Strategy	A set of ideas that outline how a product line or brand will achieve its objectives. This guides decisions on how to create, distribute, promote and price the product or service.
Tactic	A specific action or method that contributes to achieving a goal.
Tag	In social media, tags indicate or label what content is about.
Target	A specific numerical benchmark.
Taxonomy	Classification and division into ordered categories, usually hierarchical. In social media, taxonomy can refer to the categorisation of content on the Internet.
Text	Text emails or plain text emails do not contain graphics or any kind of markup.
Thumbnail	The still image that is shown at the start of the video. This can be selected, and can make a video more enticing.
Tone of voice	The register, formality and personality that comes through in the text.
TrackBack	A mechanism used in a blog that shows a list of entries in other blogs that refer to a post on the first blog.
Traffic	The visitors that visit a website.
Unique forwarders	This refers to the number of individuals who have forwarded a specific email.
Unique selling point (USP)	The aspect that makes your offering different from your competitors'.
Universal Resource Locator (URL)	A web address that is unique to every page on the Internet.
Unstructured Supplementary Service Data (USSD)	A messaging protocol used to connect mobile devices with a service provider's computers, often enabling a variety of applications and creating a real-time connection that allows two-way interaction.
URL shortener	A web tool that creates a shorter version of a full URL.
Usability	A measure of how easy a system is to use. Sites with excellent usability fare far better than those that are difficult to use.
User experience design (UXD)	The process of applying proven principles, techniques and features to create and optimise how a system behaves, mapping out all the touchpoints a user experiences to create consistency in the interaction with the brand.
User interface (UI)	The user-facing part of the tool or platform – the actual website, application, hardware or tool with which the user interacts.
User-centred design (UCD)	The design philosophy where designers identify how a product is likely to be used, taking user behaviour into consideration and prioritising user wants and needs, and placing the user at the centre of the entire experience.
Video search engine optimisation (VSEO)	Optimising videos for search engines, similar to the way in which one would optimise a website to rank higher on the SERPs.

Video syndication	The process of distributing and getting search coverage for videos.
Views	The number of times a video has been seen. Multiple views can come from one user.
Viral video	A video that becomes immensely popular, leading to its spread through word-of-mouth on the Internet via email, social networks and other hosting websites.
Visitor	An individual visiting a website that is not a search engine spider or a script.
Vlogger	Video blogger. A person who produces regular web videos about a chosen topic on a video-enabled blog.
W3C	World Wide Web Consortium, which oversees the Web Standards project.
Web application framework	Software used to help create dynamic web properties more quickly. This is done through access to libraries of code for a specific language or languages and other automated or simplified processes which then do not need to be coded from scratch.
Web server	A computer or program that delivers web content to be viewed on the Internet.
White list	A list of accepted email addresses that an ISP, a subscriber or other email service provider allows to deliver messages regardless of spam filter settings.
Wireframe	The skeletal outline of the layout of a web page. This can be rough and general, or very detailed.
Wireless Fidelity (Wi-Fi)	The transfer of information from one device to another over a distance without the use of wires.
eXtensible Markup Language (XML)	A standard used for creating structured documents.
XML sitemap	A guide that search engines use to help them index a website, which indicates how many pages there are, how often they are updated, and how important they are.
3G	Third Generation of mobile communications systems. A set of wireless protocols or standards used to transmit data to and from mobile devices. It is faster than previous generations, offering users a wider range of advanced services while achieving greater network capacity.

2D Barcode 464, 543
301 Redirect 549
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