



The ARF Social Media Measurement Field Guide

ARF SOCIAL COUNCIL
FALL 2021



THE ARF SOCIAL MEDIA MEASUREMENT FIELD GUIDE 2021

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ACKNOWLEDGMENTS

With thanks to the social media practitioners interviewed for this project:

- Ryan Detert, CEO, Influential
- Erica Gorlick, Managing Director, Senior Partner, Integrated Planning, EightBar
- Jessica Holzberg, Group Leader, Questionnaire Design, Evaluation, and Research Group, U.S. Census Bureau
- Jarrod Jordon, Chief Digital Officer, Iovate
- Matthew Krueger, VP, Media & Data, ViacomCBS
- Heather Nichols, CIO, Acorn, The Influencer Company
- Joe Prota and Chris Rightmire, Global Social Practice, Social Discipline Team, IBM
- Zack Schwartz, Deputy Division Chief, U.S. Census Bureau

Special thanks to our technology partners and stakeholders who reviewed this document, including:

- Raymond Pettit, General Manager of the Institute for Experiential AI, The Roux Campus, Northeastern University
- Jeff Zifrony, Research Manager, Twitter

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Introduction: What Is this “Field Guide?”

This guide provides a concise review for those new to social media measurement or just seeking a refresher on one or more parts of the field. Best practices covered in this guide are: Paid, Earned, Owned and Influencer Marketing. Please refer to the beginning of each section for a succinct definition of each focus area. The document was prepared by the Advertising Research Foundation’s (ARF) Social Council, which is composed of leaders in social measurement. Its members include representatives from major social platforms, brands, agencies and relevant startups. We hope you find this guide useful.

Field Guide Contents

The ARF Social Council brings together practitioners and leaders from decision-making organizations in social media marketing and measurement. The sections of the Guide align with the key areas of social measurement identified by the Council:

- **Background: The Changing Media Landscape**
- **Social Measurement Basics**
 - Sources of data
 - Base metrics
- **Paid Social Measurement:** the measurement of all social content where you pay to promote your brand/your topic of interest to a given audience.
- **Owned Social Measurement:** The measurement of content published through your owned social channels and not promoted.
- **Earned Social Measurement:** The measurement of what people are saying about a given topic or brand.
- **Influencer Marketing Measurement:** The use of people who wield influence to amplify and alter social discourse in a certain direction. This often includes paid incentives.
- **Challenges in the Measurement of Social Media:** There are some unique challenges in measuring and interpreting social media data.

For each area of social measurement, Paid, Owned, Earned and Influencer, we cover:

- **Objectives**
- **Key Performance Indicators (KPIs)**
- **Data Sources and Definitions**
- **Methods for Interpreting Data**

In addition, there are appendices that define many of the terms used here and a representative listing of the firms that offer social media measurement.

Background: The Changing Media Landscape

To understand how best to approach the measurement of this increasingly important medium, it is helpful to rewind briefly to the zenith of the TV age, since many measurement norms originated there and may or may not be relevant in this new world. The patterns of our lives and the popular media of any given moment are a natural reflection of the technology available to us. While the scheduled, unidirectional, one-to-many nature of broadcast media—like radio and television—dictated the rhythms of life and the media types that could exist in the past, the many-to-many, AI-curated nature of Social alters how we must think about measurement today.

It's 1995. Imagine an idyllic street somewhere in California where it never gets too hot or too cold. Birds are tweeting happily and dogs occasionally bark. Once in a while, a car will drive past all the perfect, iridescent green lawns and different but similar little homes. Sprinklers hiss away the days and fruit trees bear fruit. As the sun sinks behind the mountains in the middle-distance, the row of houses lights up. The same light show plays out behind hundreds, thousands, millions of living room curtains as linear TV gives people common news narratives, sports heroes and favorite sitcoms. Many of the celebrities, stories and cultural icons minted in that time of focused, shared attention remain popular today, since the reach of that era is nearly unimaginable today.

Now, fast-forward to that same street today. It is far more densely populated. Many of the single-family homes are gone and replaced by small apartment complexes. Inside, families are more diverse, and their viewing habits are so varied that a single family rarely sits together to watch a movie. Instead, each person holds a small screen inches from their face. Occasionally, some piece of content is worth sharing—a cat video or a clapback from one YouTuber to another. We can share content with people in physical proximity or, with similar ease, someone anywhere on earth who happens to be exposed to the same non-ionizing radiation that once enabled broadcast TV. Today, cellular networks, internet protocols and advances in databasing, among other changes, have led to cloud-based, social networks with user bases larger than the most populous countries and many times larger than the largest broadcast networks.

Social media has become a dominant platform across the world in terms of visitation and time spent. In 2021, social media reached over 77% of worldwide online audiences, and 90% of U.S. online audiences. Though the early 2000's saw the rise of some of the first social media platforms such as Myspace and Friendster,

Comscore is still observing growth in this category. Time spent worldwide on social media grew 25% in just the last four years. And most U.S. audiences in the 18 – 64 age groups over-index on audience composition on social media platforms.¹

Social networks owe a particular debt to the human desire to stay connected and to the invention of the relational database. In effect, a social network is an interface on top of a large number of interconnected data points per user. The data and complementary algorithms provide users with relevant information about the people, places, tastes, likes and interests they've exhibited through their online behavior. Because of the many-to-many relationships that exist between social users (we typically refer to this web of relationships as the "social graph"), the value to network users is thought to grow quadratically as each new, active network participant increases the value of the network for all others. This phenomenon, known as Metcalfe's Law, is expressed as n^2 , where n is the number of users in the social network.

The power of Metcalfe's Law makes established social networks extremely difficult to challenge and has quickly shifted the balance of power in the media industry in favor of platforms. Measurement of this new medium is still nascent, due to the extraordinary growth of emerging social networks. Furthering this measurement challenge is the distributed nature of video and other content across social platforms. The age of one-to-many media and the neat and tidy arithmetic used to tally viewers as a percentage of a population is no longer sufficient.

The Value of Social Media in Reaching Today's Consumers

Twenty-first century consumers are increasingly active on various social media platforms. Every second, eleven people in the world are being introduced to social media for the first time. As of 2020, the time an average adult spends on social media reached 2 hours and 24 minutes per day. The amount of attention a brand could get on social platforms makes these platforms a gold mine for brands across the world, big and small.

Social media represents both a threat and an opportunity; your customers are talking about you even if you are not there to listen. Social media measurement has allowed us to quantify social interactions and influence in ways that never existed before, enabling decentralization of practices like sponsorship, which was once reserved to top athletes and film stars but has now spread to nearly every micro-niche. And, of course, advertising has been transformed by social media,

¹ [Comscore](#) Media Metrix® Multi-Platform, April 2021, U.S. and Worldwide Rollup

which has moved further and further toward the center of most brands' marketing efforts.

Social Measurement Basics

Have you ever tried to "like" a TV ad? It's hard . . . yet it's something so simple and trackable on social media. We can interact with brand content and advertising on social media in a way that is simply not possible or inherent within other media platforms. In that regard, social media is both blessed and cursed with a vast array of performance metrics.

It's important to understand from where the data is coming in social measurement.

There are five primary **sources of social data**:

- **1st Party Social Analytics Tools:** For page and account owners, these tools (a list of which is in Appendix A) provide data directly from analytics platforms. Platforms control the user environment and can therefore capture direct user data on interactions. As such, these data can be viewed as being of very high quality but, since they are also self-reported, potential conflicts of interests can arise and first-party metrics should be verified by third parties whenever possible.
- **Social Advertising Platforms:** These platforms enable the execution of paid media advertising buys and also provide analytics and reporting (*e.g.* Google Adwords, Facebook Ads Manager)
- **3rd Party Social Analytics Tools:** These 3rd party tools provide components of traditional audience measurement, aggregate social metrics via publicly available social data, and access to social platform APIs. These data sets can either be publicly available or authenticated whereby the owners of the social accounts can permission additional metrics to be reported. Such social analytic services can include one or more types of derived analysis listed in Appendix B.
- **Surveys and Panels:** These platforms offer the ability to conduct surveys of their users within the platform. However, in order to link data from a survey to other data, a marketer might be interested in employing an external panel to conduct a survey. Though it can be challenging to survey within some platforms outside those platforms' survey applications, or to aggregate panelists whose social usage can be fully tracked, these methods can be helpful to supplement other data sources.
- **Third-Party Tags:** In limited instances, social platforms allow third-party tagging to verify some of their in-house metrics.

Base Metrics

There are a host of measures available for any given social media post. Below are some broad categories that help to organize the specific social metrics. As we'll get into in this guide, depending on your marketing objective and tactics, the following metrics will be valued differently within your analysis.

- **Size and Scale:** Fans, followers, impressions, reach
- **Engagements:** Likes, comments, shares, reactions, clicks, subscriptions
- **Video-Specific:** Views, view duration, completion rates
- **Social Listening:** Mentions volume, sentiment
- **Advertising Effectiveness:** Recall, favorability, purchase intent
- **Action:** Downloads, email list sign-ups, purchases

It's important to note that from these base metrics, there is a wide variety of derivative metrics that can be calculated. These include things like "rates" (click-thru rate, engagement rate) and "cost" metrics which take into account the monetary investment of a post (cost-per-impression, cost-per-click, earned media value).

Some of these metrics, such as impressions, reach, and clicks are familiar to practitioners of other digital media. In social media, however, these familiar scale and engagement metrics are most often provided by the social platforms themselves. Table 1 summarizes the various native social metrics, classified by Paid, Owned and Earned.

Table 1: Native Social Metric Classification

Paid	Owned	Earned/Organic
<ul style="list-style-type: none"> - Impressions - Reach - Other Uniques - Advanced Video Metrics - Clicks / CTA / Conversion Metrics - Leads 	<ul style="list-style-type: none"> Pages / Profile Engagement (Public) <ul style="list-style-type: none"> - Likes / Follows - Check-ins - Pages / Profile Content Published Pages / Profile Engagement (Authenticated / Private) <ul style="list-style-type: none"> - Impressions - Reach - Other Uniques Metrics Content Engagement (Public)* <ul style="list-style-type: none"> - Likes / Reactions - Shares Volume - Comments / Replies Volume - Video Views Content Engagement (Authenticated / Private) <ul style="list-style-type: none"> - Impressions - Reach - Other Uniques Metrics - Clicks / CTA Metrics - Advanced Video Metrics - Story Metrics 	<ul style="list-style-type: none"> Responses to Owned Content <ul style="list-style-type: none"> - Comments / Replies - Content Engagement Metrics Organic Conversation <ul style="list-style-type: none"> - Mention Content Volume - Hashtag - Named Entities - Keyword - Profile / Handle - Photo Tag Engagement <ul style="list-style-type: none"> - Likes / Reactions - Shares Volume - Comments / Replies Volume - Video Views Sentiment <ul style="list-style-type: none"> - Positive - Negative - Neutral Emotions <ul style="list-style-type: none"> - Joy - Trust - Fear - Surprise - Sadness - Disgust - Anger - Anticipation - Love - Hate Toxicity <ul style="list-style-type: none"> - Insult - Profanity - Identify Attack - Threat - Explicit Content

As can be seen in Table 1, some of these metrics are unique to Social, particularly those for Owned and Earned. Organic conversations referred to under Earned/Organic are posts from consumers about a brand on social platforms that

are not tied to posts or paid messages from the brand. Conversations that are initiated by consumers, unprompted by brands, are considered organic.

Other non-native social metrics include metrics familiar to digital media practitioners:

- Recall
- Favorability
- Brand Consideration
- Purchase Intent
- Brand Lift
- Purchase Lift
- Foot Traffic
- TV Tune-In
- iROAS (Incremental Return on Advertising Spend)
- Cost per Incremental X (Lead, Download, View, etc.)
- MMM (Marketing Mix Modeling) or MTA (Multi-Touch Attribution) Analysis

Finally, there are metrics unique to social media that are not native to the platforms and require the involvement of third-party services. These often involve measures of sentiment. Message pull-through, covered in the Earned Social Measurement section, is another example. For definitions of various metrics, see Appendix D.

Paid Social Measurement

Paid social advertising encompasses any placement of messaging within the social media user experience for which advertisers pay the social media platforms or associated services. In this document, we distinguish between “Paid Social (advertising)” and “Influencer Marketing,” because the two are radically different, even though both may entail payment.

Paid advertising via social media continues to grow at a rapid rate. Statista projects global social ad spending to reach \$110.6 billion in 2021. Ad spending is expected to show an annual growth rate of 5.76% (CAGR 2021-2025), resulting in a market volume of \$130.4 billion by 2025. Despite this growth, measurement remains problematic, with too many marketers still wondering what role social media plays in their marketing mix. Proper measurement can act as a basis for all subsequent decision making.

Advertising on social media has upended the traditional model, enabling an unprecedented level of interaction between marketers, consumers and media platforms, all of which play a role in the ultimate experience. At the same time, marketers have access to more data than ever before on consumer behavior and intent. This can guide marketers toward optimization of the right mix of audience buys in order to achieve their goals.

Defining those goals and a baseline for success continues to be subjective. Combined with this subjectivity is the rapid evolution of the social media landscape. New platforms and features, data regulations, and changing algorithms arrive almost daily, which can leave even the savviest of marketers overwhelmed.

As late as 2013, measuring ad effectiveness in the paid social realm was simply a measure of how many people saw an ad and clicked (impressions and CTR). This evolved into page metrics (views) and ultimately “engagement” based on time spent, likes and shares. But as many have asked in recent years, “Do likes even matter?”

Today there is a growing body of high-quality, applied research on the measurement of paid, social media advertising to understand its effectiveness and the type of metrics marketers need to make purchase decisions. Let’s take a closer look.

Paid Social Metrics Overview

In selecting KPIs for paid social media campaigns(See Table 2), a brand needs to bring to bear the same considerations it would for other media campaigns, as well as some that are unique to Social:

- Understand the product/service category (category awareness and targeted reach)
- Understand your position as a brand in the category (brand awareness and product lifecycle)
- Define the type of campaign you want to run (brand building vs. direct response)
- Capture existing intent vs. grow new intent
- Identify generalizable vs. platform-specific KPIs.

Table 2: Native and Non-Native Social Metrics

Native	Non-Native
Impressions	Awareness
Reach	Consideration
Audience / Demographics	Intent
Advanced Video Metrics	Purchase
Clicks / CTA / Conversion Metrics	Brand Lift
	Sentiment

Before determining if a paid social media campaign is successful, an advertiser needs to clearly define success. As Avinash Kaushik (author of Web Analytics 2.0) would say, “Never judge a fish by its ability to climb a tree.” This same logic applies to your tactics, audiences, goals, unit selection and bidding types for your campaign. Before jumping into a laundry list of available metrics, the first thing you need to do is think about the category in which your product or service resides.

Understanding the Category

Understanding the category includes knowing how mature the category is, how large the target market is, how frequently the product or service is purchased and the loyalty of its consumers.

For identifying how mature the category is, you can apply Everett Rogers’ [innovation adoption bell curve](#) (See Figure 1).

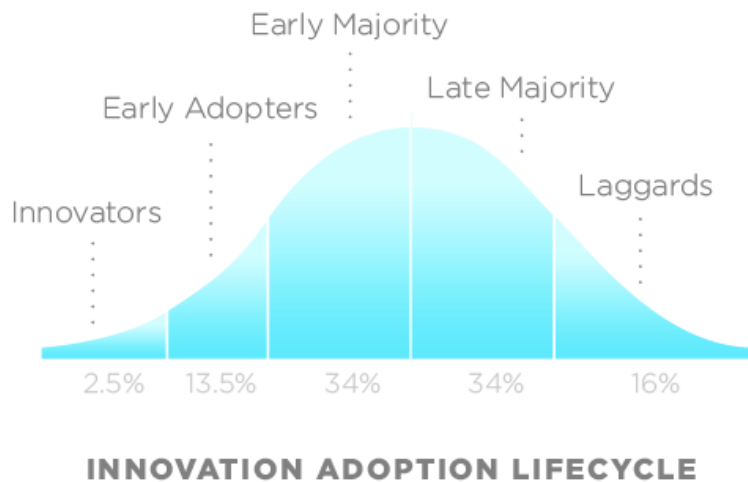


Figure 1: Everett Rogers' Innovation Adoption Bell Curve

On the left of the graph in Figure 1, your goal would be educating to grow the category and to capture an extremely targeted group of buyers. On the right, your goal would be reaching a more generalized audience and a focusing on the differentiation of your product. Think of the differences between marketing solar panels and generic soap as an example of the left versus right side of this graph.

For the size of the category's target market, it's helpful to know your potential buyers. If it's B2B or B2C, that significantly impacts your targeting and KPIs. Convincing a consumer to buy a pizza (purchase) is quite different from what it takes to sell a Fortune 500 server solution (warm leads). So, set reasonable expectations for what an advertising campaign can achieve. Notably, the audience who eat pizza, compared to those who purchase server solutions, are of very different scales.

Similarly, the frequency of purchase and loyalty in a category defines the importance of customer relationships, retention and remarketing for the cost of acquisition. This affects whether KPIs should include post-conversion information.

Understanding Your Brand's Position in the Category

Where does your brand sit within the category? Is your differentiation targeted to a more specific audience? If so, you might need to tighten your targeting. If your brand has a long history, like Coke, what else might you need to track beyond simple awareness of the brand (champion vs. challenger)? Is the product sold directly? If not, it may be necessary to identify sources of conversion data to determine what can or can't be tested.

Defining the Type of Campaign You Want to Run

The biggest distinction here is between brand building and direct response (DR) campaigns. As with other media, a brand campaign's goal is to increase the perceived value of a product. Direct response campaigns can do that too, but the most successful, short-run campaigns tend to lower the value via deals. Tag lines such as "an authentic Italian experience" and slogans like "When you're here, you're family" drive brand equity, increased perceived value and lend a premium message. Promotions like "Soup, salad, breadsticks - \$7.99," drive conversion in the short-term, but if overused, lower the perceived value to the discounted price point. Although a brand-building campaign can generate direct response outcomes, and a direct response campaign can generate brand equity, each campaign should be judged by its appropriate, desired outcomes.

Capturing Intent vs. Growing New Intent

So, you know your category, where your brand sits within the category and what type of campaign you want to run. Now, the question is: Do you want to capture the existing purchase intent or grow new intent? If you are new in a market, conversions would be new. However, if your brand has been in the market and the paid social campaign is running against a very qualified audience, it's possible that they would have converted without any additional ads. In this case, the campaign isn't creating incremental sales, but is paying to capture conversions that would have occurred anyway. This concept of incremental sales can be measured through robust experimental design.

Generalizable vs. Platform-Specific

The final step is deciding how all of this information would lead to decision making. We assume first party measurement (1P) solutions are the most accurate, as they entail a "closed loop" – whereby, ad exposures and outcomes are measured in the same ecosystem. This allows advertisers to make on-platform decisions, have more robust tests and glean higher levels of accuracy.

However, each platform could have a slightly different methodology in how they calculate outcomes. Many third-party measurement (3P) solutions help advertisers with consistent methodology across platforms. At a large enough sample size, these 3P solutions can help you make platform allocation decisions, but when comparing different units, platforms and executions become trade-offs between nuance and consistency. For this specific topic, clearly establishing KPIs up-front helps determine the actions you take after receiving your results.

Metrics Required to Decide How to Invest Paid Media Budgets

When deciding how to invest your paid social media budgets, marketers need to review several options, including:

- **Campaign Objective** – Potential objectives include creating brand equity, generating positive sentiment, gathering user-generated content and feedback and driving sales. Most social ad platforms will allow you to find users and auto-optimize your campaign to maximize results related to your objectives. For example, if your main objective is reach, the ad platforms will look to serve ad impressions to the largest, unique audience during your flight date. If your objective is conversion, the ad platforms will optimize a placement by showing it to people within your defined audience who are most likely to convert.
- **Platform** – Each platform has strengths and weaknesses based on people's levels of intent to purchase, types of ad units and relationship to the content, as well as demographics and psychographics of the people who comprise their primary audience.
- **Targeting and Reach** – The size of a target tends to move inversely with quality. For those campaigns aiming for lower-funnel targeting, you should consider tighter targeting, although that does tend to increase the CPM. Social media, with its outputs of likes and shares, offers some unique opportunities for micro-targeting. There are also a variety of micro-targeting options available on individual platforms.
- **Cross-Channel Reinforcement** – There is value in spreading investments across multiple social and non-social platforms. This ensures the greatest reach and takes advantage of the unique aspects of each platform. You should leverage common targeting data available for multiple channels, such as demographics or common segments, to ensure you reach individuals in multiple places, while paying CPMs commensurate with the purpose of each impression.

Social media is an excellent marketing investment when executed properly. Taking into account the options outlined above can ensure the best return for your investment. Also, pre-testing can be critically important for ensuring maximum ROI, bringing us to the next section.

Paid Social Placements

Each of the major social networks has built out robust advertising platforms that offer a variety of ad formats and ad objectives. This combination of functionalities allows marketers to test and optimize their ad performance using a mix of content, placements and targeting. This section will provide an overview of these paid social ad placements.

Anatomy of a Social Ad Placement

Within each placement, there are typically [three major components](#):

- Visual Content
 - Video
 - Photo(s)
 - GIFs
- Text
 - Accompanying captions or text to reinforce messaging
 - Text may be integrated into the Visual Content
- Call-to-Action
 - Each placement will provide a Call-To-Action (CTA) button that allows the customer to further engage with the product or brand, usually on either the brand's or a retailer's website where the product can be purchased.
 - Examples of a CTA are "Shop Now," "Find Out More," and "Sign Up".

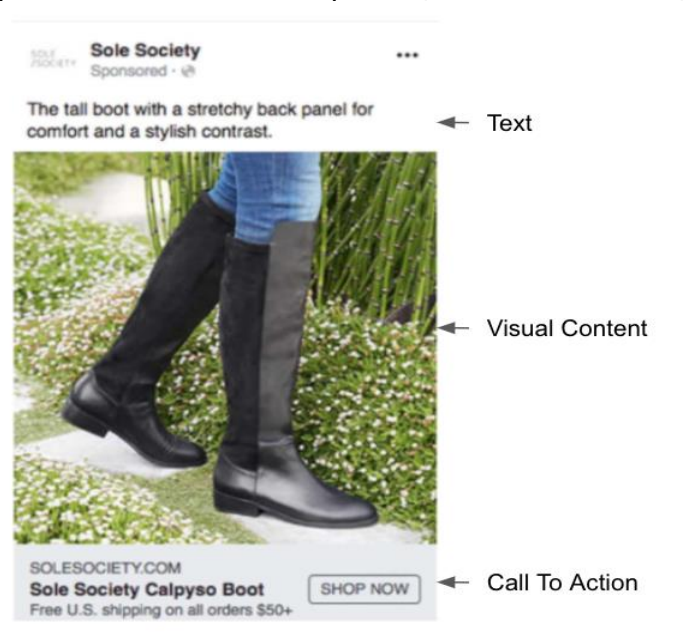


Figure 2: Example of a Call-to-Action (CTA) in a Social Ad

Placement Types

Most of the social ad networks have the following ad placement formats available:

- In-Feed
 - These placements reside in the user's main content feed which is navigated by scrolling or swiping.
 - Such ad placements are inserted natively in between the accounts that a user follows.
- Story
 - Stories are typically short-form videos, less than 15-seconds in length
 - These placements reside in a specific Stories feed or section.
 - The ad placements are inserted natively, in-between the accounts that a user follows.
- Pre-Roll
 - Platforms that host video content offer pre-roll placements. These occur at the start of a user's content.
- Mid-Roll
 - Platforms that host long-form video content will also offer mid-roll placements

Cost

Another important consideration when it comes to paid social placements is cost. There are many variables that can affect the cost of paid social placements, including:

- Platform
- Placements
- Objectives
- Targeting
- Flight Dates

It is important to define a budget for, test, optimize and measure your paid social media placements. Additionally, it is crucial for every brand to test and find their optimal social media marketing mix.

Measurement of Paid Social Distribution

Each campaign, depending on its objective, should have a set of KPIs that will measure its success. The KPIs should be agreed upon prior to the start of the campaign and remain consistent throughout.

Ad Placement KPIs

A campaign's ad placement KPIs should generally be based on what level of the purchase funnel the campaign is aiming to affect: Awareness, consideration or purchase. Examples of measurement KPIs based on objective are:

Awareness

Possible indicators:

- Reach
- Impressions
- Video Views

Consideration

Possible indicators

- Leads
- Clicks to Website
- Video Views
- Social Engagements

Purchase

Possible indicators

- Add to Cart
- Conversions (Downloads / Purchases)
- Sales Lift Impact

Measurement Studies

Brands often conduct studies to measure the overall lift that a campaign achieves, based on campaign objectives. There are different measurement methods and study types from which brands may choose.

Measurement Methods

Audience Measurement

There are traditional, third-party sources of audience measurement services that have extended into social platforms. These services use either panel or analytic census datasets, or a combination thereof, to provide social media audience reach, engagement and audience profiles.² Measurements are provided at a social category level, as well as broken out by individual, social platform service. These data are typically used for media planning purposes. Social platforms offer various ways to measure the overall campaign lift, by measuring KPIs against the exposed and non-exposed campaign audience. Typically, this measurement method is tied to a minimum media spend and reach threshold. These platform studies use polling

² For more detailed on these measurement systems, see descriptions from Comscore ([#1](#) and [#2](#)) and [Nielsen](#).

or one-to-one measurement and allow for a lift metric to be determined against the exposed campaign audience.

Panel Study Method

Measurement can also be done through a panel study where the campaign lift is measured using an offline panel of people representing the target audience. A Panel Study may be preferred, if the cost of a platform study is prohibitive or the brand prefers the ability to customize the study.

Study Types

Brand Lift Study

These studies measure brand awareness, brand favorability, ad recall and/or brand consideration. Brand lift is the most common measurement method and can be done using the Audience or Panel method. This is measured through a set of multiple-choice questions served to exposed and control audiences. The lift of the ad content is measured by the difference in results of the two groups.³

Individual brands and agencies may prefer either method for a brand lift study. The Audience method will provide a lift measurement for the actual campaign audiences, but the number and types of questions will be limited due to response rates. The Platform method allows for a larger number of questions and greater customization, but will be implemented in an offline environment.

Point-of-Sale Purchase Lift Study

The purchase lift of social campaign content can be measured at the transaction level by leveraging Point-of-Sale (POS) data. This exposed vs. non-exposed methodology allows CPG and retailers to understand the offline sales lift impact of a social ad campaign. This methodology can be implemented to measure national, geo-targeted and specific market campaigns with the following media mix:

- Organic/native only
- Paid media only
- Organic/native + paid media in aggregate

Understanding the sales lift impact, the incremental dollar sales and the return on ad spend (ROAS) are key factors to determine the current impact of a social media campaign. Industry leaders measuring these campaigns have seen an offline lift of between 4% and 15% for campaigns of four-to-12 weeks' duration and ROAS results surpassing the \$1 payback that CPG and retail anticipate in their investment.

³ For examples, see offerings [#1](#) and [#2](#) from Dynata.

Social platforms are starting to allow measurement at the household level, by leveraging Loyalty Card Datasets (LCDs). This methodology not only provides the sales impact due to the campaign but also key consumer drivers, such as penetration, occasions and dollar per occasion. The uniqueness of this analysis is that the KPIs can be provided for the total campaign as well as cohorts, such as audiences, content, ad format and pacing.

Online / eCommerce Purchase Lift Study

Most social ad-buying platforms also provide the use of conversion pixels to measure the direct effect the social ad campaign has on online sales. The conversion pixel will provide the advertiser with the actual number and value of sales attributed to the audience through either direct clicks on the ad, or ad exposure. Some ad platforms allow the view and click attribution time windows to be customized, in order to match other digital channels. The data can be used to calculate a campaign ROAS.

Location Lift Study

These studies measure the lift in foot traffic due to the ad content. This type of study is helpful for retailers looking to drive people to specific retail locations. This is done by measuring the difference in location visit rates of the exposed vs. non-exposed audiences. The measurement is done through the Audience measurement method because the results are directly tied to the media reach. It is typically done by utilizing a set of specific audiences that can be provided by a buying platform or third-party location data vendor.

Let’s try and figure out what would be appropriate KPIs for various use cases. Table 3 shows common scenarios using our earlier pizza example and another with a car.

Table 3: Paid Social Use Scenarios and Recommended KPIs

Example	Market Age	Target Market Size	Purchase Frequency	Loyalty	Position in category	Campaign Type	Intent Goal	Goal Level	Recommended KPI
Pizza	Mature	Huge	High	Mid	Mid	DR	Incr.	Channel Level	MMM
Pizza	Mature	Huge	High	Mid	Mid	DR	Incr.	Platform Level	iROAS (Incremental revenue on ad spend)
Pizza	Mature	Huge	High	Mid	Low	Brand	Incr.	Platform Level	Brand Lift (Awareness)
Pizza	Mature	Huge	High	Mid	Low	Brand	Incr.	Channel Level	Incremental Reach
Car	Mature	Low	Very Low	Mid	High	DR	Incr.	Channel Level	CPIL (Cost per incremental lead)
Car	Mature	Low	Very Low	Mid	High	Brand	Incr.	Platform Level	Brand Lift (Awareness of feature)

Owned Social Measurement

Owned social measurement is the measurement of a brand's own social media accounts, and any associated creative activities that feed into their social presence. For example, a major CPG company might manage a corporate account, along with hundreds of individual brand accounts across multiple networks. The company might also manage an extensive content creation operation to fill these channels with engaging content.

Owned Social Metrics Overview

“Social media started because it was a conversation, and it was a way to react and respond directly. [...] I do think at the heart of it, there's something about community and connection that paid [advertising] can't replace.”

–Lia Zneimer, Director of Social Media, WeWork (September 2017)

In early 2014, a [Social@Ogilvy research paper](#) showed how non-paid reach on owned Facebook pages had been falling for several straight months and looked destined to hit zero (Manson, 2014). The additional changes made by Facebook since then to further restrict reach have divided many marketers on the value of non-paid, owned content.

Despite varying opinions, most organizations still make ample use of owned content. As of mid-2017, in several markets across the globe, the share of marketers who report posting mostly non-paid or equal parts paid and non-paid, owned content is substantially larger than that of those who post mostly paid content. Although there are differences across social platforms, this trend holds across them all.

The widespread, continued use of non-paid, owned content makes sense because there are a variety of ways to use this medium. To gauge how content is resonating, organizations can measure their brand equity, partner on branded content initiatives and keep track of the quality of engagements.

However, unlike with paid metrics, owned metrics might not be as granular, outcome-oriented or comparable across social media platforms—which can make it harder to measure the content's impact or value. Without these higher order metrics, it might be tempting to discount non-paid, owned content because it's too difficult to show how it makes a difference.

Table 4: Native Social Metrics

Metric	Description
Pages / Profile Engagement (Public)	Likes / Follows Check-ins Pages / Profile Content Published
Pages / Profile Engagement (Authenticated / Private)	Impressions Reach Other Uniques
Content Engagement (Public)	Likes / Reactions Shares Volume Comments / Replies Volume Video Views
Content Engagement (Authenticated / Private)	Impressions Reach Other Uniques Clicks / CTA Advanced Video Metrics Story Metrics

Table 5: Non-Native Social Metrics

Metric	Description
Awareness	As measured in a survey
Consideration	As measured in a survey
Intent	As measured in a survey
Purchase	Measured outside the platform in various ways
Brand Lift	Measured outside the platform in various ways
Sentiment/Emotion	The distribution of sentiment scores, labels (such as positive, negative or neutral) or emotion categories within a set of user-generated content, related to a topic of interest.

Brands' or media content owners' success in deploying an owned content strategy may well depend on their size or scale, or on engagement metrics. A television program with a large audience and stars with their own strong social following, for example, may be in a better position to rely on non-paid promotions (*i.e.*, owned social), while more utilitarian brands might need to expand into paid social promotions to achieve reach goals.

The Power of Owned Data

Owned data presents a variety of opportunities. Here are a few, by measurement topic:

BYOD - Bring Your Owned Data

Owned data is literally that - your own. While in many cases, brands don't outright own the underlying raw data, they can export aggregated or anonymized inputs from their own social properties and layer them in across their own CRM databases. In this way, owned social accounts, with all the content and engagement they've generated, can function like other CRM inputs for your brand. Transported, owned data can then be used for analytics or targeting. One example would be measuring the direct impact of regional, social media campaigns by bringing your own sales data—which can be broken down by region. More advanced techniques could tie the customers' email addresses to social profiles exposed to the campaigns and provide a direct impact measurement.

Authentication

As the administrator, owner or manager of a social account, you have the ability to access a set of preferred metrics that only you can see. Behind an authentication layer, these metrics will not tell you how you compare to other entities in your space, and no one else can see them either. Instead, authentication can give you much deeper insights into performance over time, and how to find your competitive advantage or niche for your social audience.

For example, authenticated metrics can show that a specific demographic, geographical region, or psychographic segment is particularly loyal to your brand or content. You can use this insight to inform your brand strategy or future campaigns to be more effective. They may also give you deeper insights, trended over time, into how audiences are engaging with your content, especially for video and links.

A Successful Post/Engagement Half-Life

How do you know when your owned content is successful? What metric is the right one to optimize for success? It depends on what you want your content to do.

- Spread a message - Engagement types that redistribute content, such as shares and retweets
- Gauge brand affinity or familiarity - General "liking" behavior and any new/different patterns in follower growth
- Call-To-Action - Clicks on links or to content expansion
- Get video views - For longer form content, prioritize view metrics based on more seconds viewed or higher completion rates

Another way to gauge success is measuring for how long a piece of content can meaningfully garner engagement. Because owned content doesn't have any paid boosting behind it, the main reason why it will continue to engage audiences is because it is good content. The half-life of a post – the amount of time in between a post's peak level of engagement and half that peak – can show the staying power of owned content.

Adding Money to Boost Content

When a piece of owned content is successful, it might be worth paying to boost (or amplify) it and show it to many more people. If the message was resonating with audiences and generating engagement for brand affinity or video views, then boosting the post can put the content in front of more people who would have similarly favorable reactions.

Always-On Brand Equity Data

Posting non-paid, owned content is one way of bringing in a constant stream of engagement data with which to measure brand equity. Text comments, whether or not they are prompted by the brand, can be used to measure a social Net Promoter Score (NPS). Each social platform has its own, unique blend of drivers to increase follower counts and engagement rates. As a brand or marketer, you should directly engage with executives at the social network to learn from them as to what works best for their platform. Getting informed on best practices directly from the source is a critical component for engagement, and the social networks are more than willing to provide brands and content producers with best practices.

These tactics are constantly evolving. As these platforms expand their offerings, it makes sense for brands to increase the breadth of platforms and tactics that they use. Brands should constantly take stock of the state of play. Tactics might be as simple as implementing multiple posts a week or live streaming capabilities or becoming more involved with story features.

Brand equity should be continuously measured, not just during a marketing campaign blitz. It's important for a brand or content producer to have a consistent and engaged audience and demonstrate that their efforts are showing growth—in both the size of their audience and the frequency with which it is reached. At a minimum, a brand should have access to its audience across all social platforms, in a longitudinal manner, in a single view or report. For those with the time and resources, always-on brand health monitoring allows for deeper insights into how and why reach and engagement metrics are changing.

Bringing ongoing survey and behavioral data points into a cohesive, recurring review process further enables the brand or content producer to understand key factors of awareness, loyalty and intent, for themselves and their competitors. Key questions that can be answered include:

- Are the aforementioned brand equity efforts improving these KPIs?
- Are there external market signals I should be aware of?
 - Are they positively or negatively impacting the brand?
- Which campaign efforts are having the most impact on my KPIs?
- What ad copy and/or airing strategies work best for certain KPIs?
- Am I driving sales impact through my social efforts?
 - How can I best forecast it?

Earned Social Measurement

Earned social measurement is the art of quantifying what people are saying about your brand, or any topic, “when you are not in the room.” This can include practices like social listening and emotive analytics. The idea is to harness social media as a sort of 24/7 focus group. One major challenge today is that few platforms allow access to a meaningful slice of “earned” conversations so conclusions may not be representative. It is preferable to pair learnings from earned social measurement with traditional research when possible, since online consensus can vary significantly from true popular opinion.

The world is communicating faster and more frequently than ever before. In 2020, pandemic-related factors like stay-at-home orders, prompted people to use social media even more—with a 24% increase in average minutes per user from 2019⁴. As the amount of available online content rises and the speed of communication quickens, a brand’s message becomes diluted, filtered and transformed in the blink of an eye. Driving advocacy within the social marketplace is an enormous opportunity, yet its measurement remains a challenge in this rapidly moving environment.

This is especially true for earned social media mentions, as they are outside of a brand’s control. Earned media is neither owned, nor paid for exposure, by a brand. Whereas the earliest form of earned media, “word of mouth,” likely predates brands, earned media is perpetually evolving and reacting to new contexts, new mediums and new cultural phenomena. Consumers are interacting with different media channels and sites while their choices are evolving and new choices emerging at a jarringly fast rate.

The [2021 Edelman Trust Barometer](#) reveals a pervasive state of mistrust of information sources around the world, including societal institutions, global leaders and media. Yet, people have been looking to others to inform their decisions for years. Research has shown word of mouth to be directly responsible for one-in-five purchase decisions (19%) and influencing up to nine out of ten (90%) of purchases⁵. [Further research](#) demonstrated that by stimulating a 10% increase in its earned media, a brand could drive sales revenue by up to three percent.

Paid and owned media can be used to spark conversation and give people something to share with others in their social networks. That said, earned media provides advocacy, endorsement and magnification of a brand’s efforts in a variety

⁴ [Comscore](#), 2021.

⁵ [Baer, J. and Lemin, D.](#) (2018): [Talk Triggers: The Complete Guide to Creating Customers with Word of Mouth](#),

of media channels. Earned media is dependent on people having something to talk about. Not surprisingly, a plethora of publications and podcasts provide techniques to stimulate earned media mentions through earned media triggers. "Make yourself memorable, relevant or differentiated," says [Jay Baer](#), entrepreneur, *New York Times* best-selling author and the founder of multiple multimillion-dollar companies. "People don't talk about things that are the same. They talk about things that are different. So, the idea is to [showcase a] differentiator that customers are like 'oh, that's interesting, that 'hold music' is hilarious, instead of just 'smooth jazz.' You expect smooth jazz."

For the purposes of this section, we will focus on earned media and its measurement. Measurement of earned media requires a clear set of objectives around reach and engagement and an understanding of what drives impact for your business. Our aim is to provide a solid foundation for building an effective measurement strategy for your earned content.

Earned Social Metrics Overview

The following tables show frequently-used native and non-native earned social media metrics.

Table 6: Native Social Metrics

Metric	Description
Responses to Owned Content	Comments / Replies Content Engagement
Mention Content Volume	Hashtag Keyword Profile / Handle Photo Tag

Table 7: Non-Native Social Metrics

Metric	Description
Sentiment/Emotion	The distribution of sentiment scores, labels or emotion within a set of user-generated content, related to a topic of interest.
Share of Voice	The proportion of activity/sentiment generated by specific groups, designated by standard labels or some other themes.
Relevance	A weight applied to the media outlet, depending on the perceived relevance of its audience to the advertising category.
Purchase/Action Intent	The percentage of organic posts with an expressed likelihood to purchase/sign up for products or services.
Toxicity/Profanity/Threat Level	Percentage of the posts that contain toxic/profane/threatening language. This type of metric is often used for data cleansing, and for risk monitoring.

How KPIs Differ by Channel/Platform

Two factors are seldom stable in the social media landscape, resulting in certain platform dependent metrics:

1. The emerging social media platforms, especially the ones with new formats of digital content
2. New features and ways of engagement created by social media platforms, as a way to differentiate their product.

To that end, the KPIs listed in Tables 6 and 7 provide a categorical view that can be applied to a broad number of media platforms. During implementation, it will be essential to learn about the latest metrics available at each platform. For example, does the platform have “comments”, “likes”, “dislikes”, “upvotes”, “downvotes”, “shares” or emoji reactions to gauge engagement? If it supports video plays, does the platform display the total number of views?

How Different KPIs Allow for Different Actions

There are varying types of measures to gauge the favorability around a brand, campaign or event. Sentiment analysis and emotion analytics differ in important ways, primarily around the depth of understanding and actions they drive.

In 2010, the biggest question around sentiment was, "Does this social platform measure it?" Many did, but not all - as the measurement of sentiment was seen as unreliable, given such things as sarcasm. In a matter of years, it was no longer an option, and sentiment became table stakes, as a metric of Positivity/Negativity/and Neutrality. Sentiment could be measured and monitored over time, against other brand moments (such as different campaigns or events), or relative to competitor brands. For deeper insight, brand mention volume could be crossed with sentiment to understand if a spike in conversation was attributed to a negative or positive event.

Not all positive mentions are created equal, however, in that customers may show *anticipation* for their next phone or *delight* around the latest flavor of their favorite snack chip. So, the marketing messaging would necessarily be different, depending on the type of positive sentiment. Similarly, *fear* associated with a brand requires a very different brand response than *disgust*, and a misstep could drive further negativity. Thus, breaking down sentiment into emotions is meaningful and valuable for determining the actions to be taken by a brand.

Robert Plutchik's *Wheel of Emotions* is highly regarded and covers the eight primary emotions, which may be tagged in social media measurement. These include joy, sadness, disgust, fear, anger, surprise, anticipation and trust. Within the wheel, intensity of emotion decreases as you move outward and increases as you move toward the wheel's center and is indicated by color (*i.e.*, the darker the shade, the more intense the emotion).

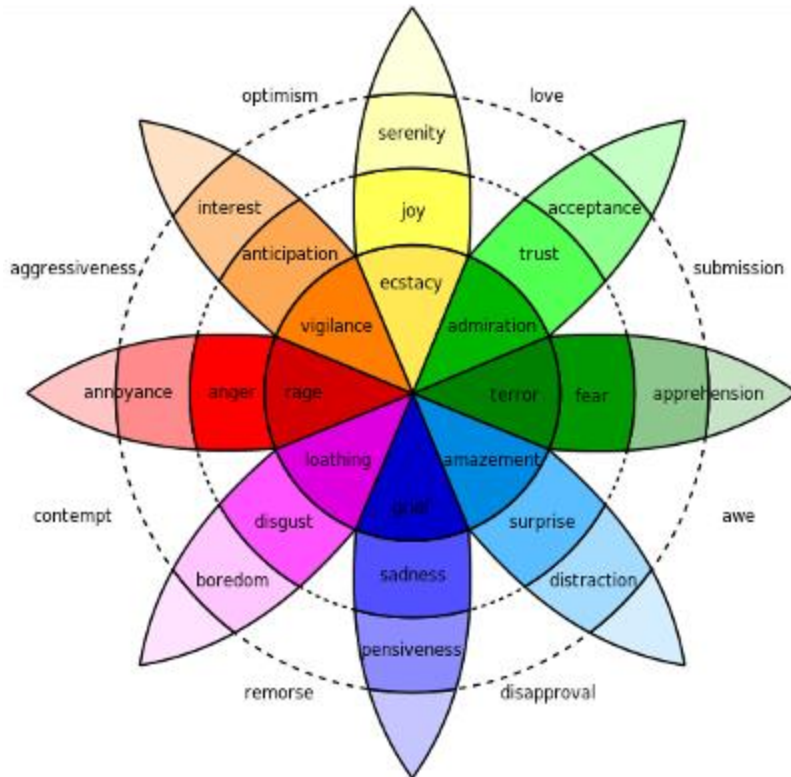


Figure 3: Plutchik's Wheel of Emotions (1980)

Regardless of how you measure it, emotion has become a more prominent metric of brand favorability and campaign or event success, while sentiment analysis remains a pervasive measure and a "quick hit" view, in any marketers' earned media toolkit. This example depicts how choosing the right KPIs allows for nuanced interpretations of your data and opens up possibilities for the correct brand response.

Earned Social Media as a Means of Measuring the Effect of Other Social Channels

When people generate earned social media mentions, they are creating a stream of media behavior. This stream can be aligned with other measurement streams to better understand the potential interaction among various media behaviors. For example, social media activity can be aligned with TV ratings, website visits, YouTube views or search activity.

Studying this alignment can shed light on how different media behaviors change together in either similar or different ways. It does not, however, conclusively show that one behavior causes another. If—after aligning earned social media activity

and website visits—it appears that both rise together, it could be that either one causes the other to rise or a totally different factor causes them both to increase.

Alignment (or its more statistically robust version, correlation) isn't the strongest measure of behavior, but it is often the easiest. Proving that one action directly causes another usually requires complex datasets that are not often available from earned social media activity. Some of the social media platforms can create hold-out audiences that enable brands to measure the impact of Paid Social on Earned Social—the volume and/or sentiment of conversations generated by a paid message. Twitter, for example, is able to estimate the number of incremental tweets sparked by a campaign by comparing an exposed to an unexposed control group. This methodology enables brands to measure the degree to which the brand drove conversations on Twitter. However, it is difficult to control for exposure to a campaign on other channels, and so this methodology rests on the assumption that the levels of exposure on other channels are comparable between exposed and unexposed groups.

Even in the absence of such strong, causal proof, the ability to observe whether or not behaviors change together is still a useful first step in understanding media behavior at a general level.

Before aligning earned social media activity with other measurement streams, ask yourself these six questions to help organize your data and interpret the results:

1. Are there other, outside factors that might be affecting people's behaviors?

Commercials on TV, digital ads online, and even out-of-home billboards can affect our media behaviors in divergent ways. While controlling for all of these factors is difficult, having a sense for their magnitude is important when drawing conclusions on how social media fits in.

2. Do any of the behaviors involve seasonal trends?

Knowing in advance that certain behaviors will always increase or decrease at certain points in the week, month or year can help quickly explain away certain changes that would normally be red flags for shifts in data.

3. How long is the time horizon for which you would expect to see a change?

The spread of a message on social media can have an immediate or long-tail impact. Breaking news can alter people's behavior right away, but a growing cultural conversation might need months to gradually shift people's hearts, minds or actions.

4. Is your social media data on a different scale than your other measurement streams?

It's harder to gauge how metrics are changing relative to each other, when one is orders-of-magnitude larger than the other. Rescaling your data can make it easier to visually—and statistically—assess more meaningful relationships.

5. Do you expect the behaviors to happen concurrently, or should there be a lag between them?

Treating multiple media behaviors as a sequence of events, rather than immediately concurrent episodes, can highlight more logical relationships. Intense, social media activity about an event can't happen until the event has actually taken place.

6. Is there any other domain knowledge that would help the interpretation of your analysis?

Sometimes putting two datasets next to each other will immediately reveal an interesting relationship, but oftentimes it takes more inspection and testing to reach meaningful conclusions. Having an understanding of the measurement dynamics and intricacies of your data and industry helps in communicating the insights from your results.

With an aligned measurement strategy, earned social media evaluates social campaigns that cover the entire customer journey. Be it growing brand equity or lead generation, an effective, earned, social media strategy can build a brand by leveraging the authentic nature of such content. When executed well, the conversation rate from earned media can be significantly higher than other types of posts.

Measurement Approaches

As with other data sources, the measurement approaches for social media largely depend on the goal of the associated campaigns or initiatives. Here, we outline some typical approaches for aligning goals with metrics and cadence. Please note that this list aims to provide a general overview and is by no means exhaustive.

Industry Landscape or Competitive Analysis

The goal of such an initiative is usually to develop a social strategy based on the current perceived strengths or weaknesses of the key players in a given industry. The measurement strategy usually involves comparing relevant metrics against

competitors' and normalizing the data, to derive a single score that reflects the relative position of the brand. Typical metrics used involve a combination of quantitative metrics, like the volume of organic posts and engagement for each brand, as well as the qualitative measures, like what percentage of the posts contain a certain sentiment. The benchmark measurement only needs to be conducted once, and on-going tracking can be done weekly, monthly, quarterly or annually, with quarterly being the most common for most industries. Such measurement aids in understanding the overall effectiveness of a brand's communications strategy and is often supplemented by campaign-specific measurement programs.

Campaign Effectiveness Analysis

In order to evaluate the return on investment of a campaign and continue to optimize the campaign strategy, including the tactical details, brands often need campaign-specific measurement programs. Typical awareness campaigns could be evaluated on the volume of organic posts and the associated engagement, as a reflection of their resonance. Simple metrics, like impressions, tend to exaggerate the impact of the campaigns and, as such, are increasingly less popular. More sophisticated campaigns would take the target audience into consideration and include the relevant reach and message pull-through rates (*i.e.*, the degree to which a brand's key messaging is being properly displayed in earned posts) into the mix. Influencer campaigns (covered in the next section) are evaluated with more of a marketing angle, sometimes including metrics like click-through-rate, to track the purchase of an influencer's audience.

Ad hoc Situational Assessment

Occasionally, brands face unexpected situations or crises in which they need a quick assessment of the severity of particular issues. Such a report would track the spread and impact of a certain narrative, monitoring the change of quantitative metrics. The turnaround time is usually within hours, and the analysis typically prioritizes comprehensiveness over depth.

Influencer Measurement

Influencer measurement is about measuring the partnerships between creators and brands. As brands partner directly with influential consumers, they are taking a step toward decentralizing some of the tried-and-true marketing methods, like sponsorship, that have worked for centuries. Technology enables us to quantify influence and deploy campaigns at scale. As such, the industry would not exist without measurement. Although the decentralized nature of influencer marketing makes measurement a moving target, there are some critical best practices that can set a basis for good influencer measurement.

Table 8: Influencer Metrics Overview

Metric	Description
Social Influence Indicators	How big is the candidate's influence? What is the influencer's ability to reach their audience? How engaged are the influencer's followers?
Audience Compatibility	Does the influencer's audience fit the brand's audience profile?
Brand Relevancy	Do the influencer's posts reflect the brand? Does this influencer feel authentic to the brand's reputation?
Commercial Potential	Do the influencer's followers show interest in purchasing or trialing the product or service mentioned in the post?
Selected Content Performance	How engaging is the influencer's selected content (e.g., past sponsorship or a specific category)? Does their audience react to their sponsored content favorably? Do those interactions indicate intent to purchase?
Sales Lift Return on Ad Spend (ROAS)	Among those exposed to an influencer campaign, what was the conversion rate to offline sales, relative to a control (i.e., not exposed). The incremental dollar sales due to the influencer campaign, relative to the cost of the campaign.

Influencer marketing has quickly moved from the latest social media trend to a key budget item in advertisers' social media plans. This form of marketing enables an advertiser to reach consumers on a personal level, organically appearing in social media content published by someone they have an emotional connection with, whether a celebrity (mega-influencer), social blogger (micro-influencer), or friends and family (macro-influencers).

Studies have repeatedly shown that advertisers can expect a much higher return on investment from their influencer marketing efforts than any other form of advertising. For example, a June 2018 survey conducted by Marketing Week's sister publication, [Celebrity Intelligence](#), found that for "£1 spent on influencers within the beauty industry in 2017, brands received an average return of £8.81.

While advertisers use a variety of means to measure ROI, the industry currently does not agree on a standard set of metrics. With each advertiser measuring success differently, the challenge exists for knowing how well their influencer partnership actually performed, relative to others. Additionally, there are issues around influencer fraud, bot activity, and the E.U.'s General Data Protection Regulation (GDPR; see next chapter on "Challenges"). Advertisers are keeping these issues at the top of their minds. In the WFA study, 96% of advertiser respondents stated that the quality of followers will be "very important" when partnering with influencers.

Given these issues, it's apparent that there is a need for measurement that brings transparency to both ROI and authenticity in the influencer marketing space, as well as answers to questions like: How do the various tiers of influencers perform against each other? How can you measure paid vs. earned influencer marketing activations? With whom should I partner?

Types of Influencers – Celebrity vs. Macro vs. Micro, Paid and Earned

Marketers are relying on audience size to evaluate whether an influencer will help drive success for a campaign. Influencers are generally broken into the following buckets: celebrities, macro-influencers, micro-influencers and nano-influencers. Each tier provides different pros and cons and must be matched to a campaign's goals and objectives.

Celebrity Influencers

We defined a celebrity as an individual that built a large social following, based on off-line talent. Influencers conversely have built their social following on content creation and connecting with viewers on a one-to-one level. Brands typically choose to work with celebrities to benefit from their greater reach and generate high levels of awareness of their product or message. A large budget is required to hire celebrities and it may be supplemented with paid distribution.

Macro-Influencers

Influencers who have amassed a large audience, defined as greater than one million followers across multiple social media networks, have built their following primarily through their content. When brands work with macro-influencers, they select a few digital influencers which may be supplemented with paid media, to extend the reach of their social posts. Macro-Influencers also provide cross-over fame like celebrities, allowing the brand to reach a broad audience.

Micro-Influencers

As questions grow around the validity of social followers, conversations around the subject of leveraging micro-influencers have begun to increase. With less than 100,000 followers, these influencers provide the opportunity for a brand to target a specific audience with its message. [Micro-influencers tend to be lower cost and have a higher engagement rate than larger celebrities](#), allowing marketers to leverage more influencers for their campaign.

When determining whether partnering with micro-influencers is the best solution for your campaign, it's best to look at the campaign objectives. With this type of influencer, you are able to target a niche audience, however, to gain any sort of measurable reach, a campaign will need to leverage multiple influencers to increase campaign exposure. [There is also a concern that quality will be affected](#), as micro-influencers are generally newer and not as established as larger influencers.

Nano-Influencers

Influencers that have between 1,000-5,000 followers on social media tend to be specific, industry experts and may also be well-known in a specific geographic location. Paid media may also be used to supplement their native posts. Nano-influencers can be effective creating product consideration using their expertise in specific subject matter, B2B, or local influence.

Paid Influencers

Paid influencers are those hired by a brand to promote its products or services. They can be celebrity influencers or macro-, micro-, or nano-influencers. There are several types, ranging from brand ambassadors—a select group who help promote a product or service for an ongoing period of time—to Brand Advocates, a larger group inclined to favor the brand and are offered free samples. Although Brand Advocates tend to require a smaller investment, it is more difficult to control their messages.

Earned Influencers

Earned influencers are those who extol a brand's virtues without receiving compensation for it.

Steps for Measuring Influencers

Consider the following steps when measuring influencers' impact at different points of the campaign:

Pre-Flight (Before Influencer Relationship)

1. Data Collection
 - a. Scraped
 - b. Using Predictive Modeling
 - c. Public API from Social Platforms
 - d. Private API from Social Platforms

In-Flight (During Influencer Campaign)

1. Tracking
 - a. Performance against benchmarks
 - b. Return on investment segmented by posts, influencer and social media platform
 - c. Analysis of audience behavior and engagement quality

Post-Flight (Overall Campaign Performance)

1. Return on Investment
2. Return on Ad Spend
3. Content performance insights

Challenges in Social Media Measurement

As with all types of marketing measurement, there is often no way to access a “comprehensive” data set or even a randomized sampling of a population. At the same time, the limited data to which we do have access can be overwhelming. In addition, we are challenged by the fact that, as the dominant public forum of our time, the social media world is full of conflicting, and sometimes malicious or misleading signals. Though there are bad actors, sometimes people with good intentions can misdirect insights gleaned from social media. What’s more, vocal minority views may erroneously appear to dominate a conversation by creating vast sets of “mentions” on a given topic. The following is a brief discussion of some of the measurement challenges that we see in social media.

Some of the general challenges are:

- **Communicating Value Internally:** A problem faced by many in the social advertising space is communicating the value of specific social metrics to key stakeholders. Some teams choose to focus on engagement metrics (*e.g.* views, shares, comments) as a measure of success, while others may concentrate on reach, potential impressions, or response rates to define success. There may also be a larger focus on paid social media to demonstrate ROI, versus the outcome of owned or earned social media posts.

As a whole, the value of social advertising is becoming more widespread and recognized across the industry as brands spend billions of dollars each year on social media advertising. The reach capabilities of social media platforms are unmatched and the seemingly never-ending unveiling of new targeting features by the platforms helps brands continue to reach their key audiences.

- **Defining KPIs:** Another broad challenge is the identification of key performance indicators (KPIs) ahead of a campaign launch. Setting KPIs is vital for defining the success of a social campaign and delivering an informative campaign report. However, differing metrics and measurement practices across social media platforms can make it challenging to establish comprehensive benchmarks and develop a cohesive story of the campaign’s performance. To help ensure that KPIs are feasible and align with the campaign’s goals, the intended business impact of the campaign needs to be communicated across teams. KPIs need to be clear, specific and measurable, in order for all teams to work towards a common goal.

- **Using NLP:** Natural language processing (NLP) is another prominent challenge faced by social media marketers, specifically involving brand sentiment and reputation analysis. Natural language processing technology continues to evolve and is becoming more precise in deciphering and making sense of human interactions online. However, there are still many discrepancies between what humans online are saying and what these computer programs are able to understand. When determining sentiment toward a specific brand, there are many different manners in which a computer may read statements about the brand. There is often confusion around specific words or phrases that a computer may identify as negative sentiment, but that the post’s author intended as a positive sentiment—or vice versa. Humans and computers will continue to forge a hybrid approach around brand sentiment and reputation analysis, as some manual coding will be required by humans within computer programs.

To help combat the challenges and limitations, while facilitating the process of social media measurement, there are technologies that brands wish existed in the industry. Modeling, visualization and AI tools are recognized industry-wide as tools that would help increase efficiency and productivity.

Other challenges in measuring social media audiences and impact are:

- Fraudulent Traffic, Followers and Accounts
- Misinformation
- Data Access and Privacy
- Data Deluge & Manipulation, specifically:
 - Vocal Special Interests
 - Vigilante Mobs
 - Hostile Governments

Each of these is discussed in more detail below.

Fraudulent Traffic, Followers and Accounts

As social media’s popularity has grown over the past decade, so too has the number of fraudulent accounts and bots across social platforms. These fake accounts pose a challenge to social marketers as they generate fraudulent traffic and followers for brands. In the first nine months of 2020 alone, Facebook [blocked](#) 4.5 billion fake accounts from its platform.

Fraud prevention is incorporated into all campaigns when vetting talent, since it is imperative in ensuring relevant reach and maximizing program KPIs. When identifying criteria like fraudulent followers or meaningless engagements, it is important to have a mix of both technology-based and human review to properly vet social media accounts. For example, data can tell you that 60% of a New York influencer's followers are from Brazil. If that influencer lived in Brazil until last year, there is a logical explanation behind why their followers skew toward a non-U.S. country.

"Red flags" in any of these data points can indicate that an influencer is buying followers, engagements and/or site traffic. However, it is important to not just label an influencer as fraudulently inflating their numbers, but to understand why seemingly suspicious activity is taking place. Was a large one-day spike in follower growth due to an influencer buying followers, or was there some sort of major press around them that generated the spike? Are high bounce rates due to buying fake / cheap traffic or to how their site navigation is structured? It is recommended to take a conservative approach if you cannot identify the reason behind the suspicious activity. You should err on the side of caution and avoid partnering with that Influencer. However, to adequately screen talent, both brands and agencies need to look beyond data points and understand the "why" behind them.

There are several tools, some of which are listed in Appendix C, that are effective in identifying fraud or suspicious activity, relative to engagements and followers. The majority of these tools tend to focus on specific areas (*e.g.*, only reporting on some fraud identifiers, or only working with select social networks); so it's important to utilize more than one tool to fully track fraudulent activity. Tapping into social networks directly (*e.g.*, Facebook Insights) is also effective in understanding audience demographics. Tools like SimilarWeb and W2Snoop can help identify fraudulent activity on blogs and websites by reporting on metrics such as referral sources and bounce rate.

David Neuman, head of strategy and social for RhythmInfluence, recently impressed upon the ARF Social Council that data only tells part of the story. It is important to have a resource, either internal or external, who can make sense of the analytics and determine if an influencer might be artificially inflating their numbers, or if there is a reasonable explanation behind the suspicious activity.

Something to be mindful of is the rise in social accounts leveraging AI technology to post and comment. Some of these accounts are completely controlled by AI, without a human ever generating content or interacting with other accounts. Since many of them have an authentic follower base and are responding to other posts in a relevant manner, technology can struggle to identify them as a bot. AI-based accounts with this level of complexity currently represent a very small percentage

of active social media accounts. However, as this technology starts to become more commonplace, fraud-hunting technology will need to adapt in order to be able to at least identify accounts leveraging AI technology.

Misinformation in the Age of Social Media

One of the biggest threats to a brand's social presence and reputation is the spread of misinformation. Mis/disinformation on social media platforms has been rampant in recent years, particularly involving information surrounding politics and current events. Because the spread of misinformation can negatively impact a brand's reputation, brands must be agile in protecting themselves against rumors and distorted information. Many brands invest in social monitoring and listening tools to stay informed of the online discussion involving their brand(s). (For examples of these tools, see Appendix C.) Alerts are set up to receive immediate notification of any disruptions or trending topics regarding the brand across social platforms. Brands also rely on tracking specific keywords to better understand sentiment and to track negative trends. These types of monitoring procedures allow for brands to react quickly to any issues that arise, fact-check information as needed, and delete any posts/comments that pose a threat.

Data Access and Data Privacy

Without data, we have nothing to measure. Access to data is currently limited to the metrics a social platform chooses to provide and is not consistent across platforms. Social interactions take place within private "walled gardens" (or gated communities) under the auspices of varied, explicit and implicit social contracts. The terms of service for each platform, which can and do change frequently, have the potential to derail sectors of the measurement industry. Meanwhile, platforms are under ever-increasing pressure to share *less*, not more data with third parties. It is becoming increasingly difficult to develop "currency," and transparency is needed as calls for heightened security of personal data increase.

One major note on data coverage is that, today, Facebook does not permit searching of private posts nor do they allow access to full search of Instagram. As a result, most social listening is focused on Twitter, which is just a corner of the larger social media universe. It is important to consider what sort of bias may creep into our analyses of earned social media when we only analyze tweets.

The social platforms provide the ability to collect a "comprehensive" dataset through consent. Users agree to sharing specific data with social platforms when they sign up to create an account, which is then shared through the platform's analytics offerings. There are many laws and regulations in effect to help protect users' rights and personal data, such as the GDPR in the EU. These regulations

have forced social platforms to become more transparent and direct in their communication of what user data they collect and use and to give users the opportunity to choose what they can share. Data privacy laws are frequently changing and it is important for both platforms and brands to be up-to-date on the latest practices and guidelines.

Data Deluge and Manipulation

Though we have access only to a limited swath of social media data, they can be very large and thus difficult to deal with. Unlike the outputs of most marketing measurements (*e.g.*, TV, surveys, media buy read-outs, PR campaign reports), raw social data is usually too large to manipulate in Excel. As a result, many users are forced to either utilize a third-party tool to slice and dice the data, or they must hire a data science team to do more custom analytics.

Many players seek to manipulate social media. The specific tactics are far too numerous to enumerate here in any detail, but manipulators can include some of the following notable and well documented, recent examples:

- **Vocal Special Interests:** Everyone gets to amplify their voices on social media and, sometimes, like-minded small groups can amplify each other in a way that causes their viewpoint to appear more prevalent than it is. This can happen for brands when they upset specific, existing interest groups. It is important to utilize surveys to determine whether apparent social media outrage will actually impact a brand, in order to avoid overreactions. Much social outrage burns out quickly.
- **Vigilante Mobs:** In certain extreme cases, social media users organize to bring a sort of crowd justice against their targets. Vigilante mobs often target specific individuals (sometimes based on faulty information) and seek to harm them. Usually employers are contacted, anonymous figures are doxxed (exposing private information without consent), their families are harassed, and, in rare, terrifying cases, online mobs will threaten or commit offline, physical violence. Needless to say, no marketers have any interest in participating in online mob behavior, but it is not always possible to avoid becoming a target of such activity. For brands with many public interface points, it can be especially difficult. Mobs can occasionally coalesce and come after a brand. When mobs form and become abusive, brands, like all social media participants, should try to stand up for their principles and avoid succumbing to the noise endemic in these situations.
- **Hostile Governments:** While not usually relevant to brand marketing efforts, hostile governments are increasingly strident manipulators of online

conversation. This can particularly impact measurement efforts of events such as elections, international sporting events, sensitive public health campaigns and more. It can be difficult to identify the actions of these sophisticated actors. When they take action, it can include fake propaganda posts that push some government-sponsored position(s) from bot or troll accounts. Sometimes accounts are hacked or people are doxxed. For marketing measurement, the best we can often do is to use complex filters or machine learning to guess which posts are from inauthentic accounts (including those of governments). Sometimes, topic filtering can also be helpful when there is a known propaganda effort underway.

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APPENDIX A: SOCIAL PLATFORM FIRST-PARTY MEASUREMENT

- Facebook Insights, CrowdTangle
- Instagram Insights
- Twitter Analytics
- YouTube Analytics
- Snapchat Measurement

APPENDIX B: THIRD-PARTY SOCIAL ANALYTICS TOOLS

- Owned Social Analytics
- Social Listening and Sentiment
- Syndicated Measurement
- Verification
- Audience Insights
- Influencer Analysis
- Video

APPENDIX C: MEASUREMENT PROVIDERS

Company	URL	Specializes In
Canvs	https://canvs.ai/	Emotion analysis of social media content
Cision	https://www.cision.com/	PR monitoring, social media management & social listening (acquired Falcon.io, Brandwatch, Union Metrics)
Comscore	https://www.comscore.com/	Digital measurement of social properties and subchannels
Converseon	https://converseon.com/	Natural Language Processing (NLP) as a service of social media content
CreatorIQ	https://creatoriq.com/	Influencer measurement
Demographics Pro	https://www.demographicspro.com/	Audience insights derived from social content
DoubleVerify	https://doubleverify.com/	Verification
Dynata	https://www.dynata.com/	Panel provider, Google Ads Data Hub (ADH) measurement partner, Facebook/Instagram brand lift, creative testing, audience validation
Engagement Labs	https://www.engagementlabs.com/	Brand conversations both online and offline
Fullscreen Media	https://fullscreen.com/	Tools for social media content creators and brands (owned by Otter Media, a subsidiary of AT&T's WarnerMedia)
HypeAuditor	https://hypeauditor.com/en/	Help in identifying fraud
IBM / Watson	https://www.ibm.com/watson	NLP and AI for social content
Infegy	https://infegy.com/	Social listening and sentiment analysis
Influenster	https://www.influenster.com/	Influencer marketing activation and measurement
ListenFirst	www.listenfirstmedia.com	Social intelligence, analytics and measurement
Moat	https://moat.com/	Verification (also referred to as Oracle Advertising)

Meltwater	https://www.meltwater.com/en	PR monitoring, social media management & social listening (acquired Linkfluence, Datasift, Sysomos)
Netbase	https://netbasequid.com/	Social listening
Nielsen	https://www.nielsen.com/us/en/	Verification
PeoplePattern	https://peoplepattern.com/	Audience insights derived from social content
Shareablee	https://www.shareablee.com/	Owned social analytics
Social Bakers	https://www.socialbakers.com/	Social analytics
Social Blade	https://socialblade.com/	Help in identifying fraud
Sprinklr	https://www.sprinklr.com/	Social media management and analytics
Sprout Social	https://sproutsocial.com/	Social media management and analytics (acquired Simply Measured)
Stat Social	https://www.statsocial.com/	Audience insights derived from social content
Sylo	https://www.meetsylo.com/	Third-party influence measurement
Synthesio	https://www.synthesio.com/	Social listening (acquired by Ipsos)
Tagger	https://www.taggermedia.com/	Influencer marketing activation and measurement
TalkWalker	https://www.talkwalker.com/	Social listening and syndicated cross-platform social TV measurement
Tubular Labs	https://tubularlabs.com/	Social video analytics

For a comprehensive list of vendors in this space, see <https://lumapartners.com/content/lumascape/social-lumascape/>.

APPENDIX D: DEFINITIONS OF KEY TERMS

Always-On	A measurement process that operates continually and automatically.
Attribution	The effort to assign a value to the impact of a particular media or marketing activity on a marketing outcome of interest, such as sales, revenue, registrations, applications or foot traffic.
Authenticated/Private Metrics:	Data available only to the owner of the content.
Authentication	A process wherein a user of a social platform is required to enter information that uniquely identifies them, such as an email address.
Brand Affinity	A measure of consumers' positive orientations toward a brand relative to other brands in the category.
Brand Consideration	A measure, usually survey-based, of the percentage of target consumers who would consider purchasing a particular brand.
Brand Equity	The commercial value of a brand derived over time, based on awareness, from the brand's name and perceptions of its assets. It is also used to refer to the ability of a brand to extend beyond its primary association, into other related categories for which it might be appropriate.
Brand Lift	A broad construct related to the positive impact of advertising or other marketing communication on the perception of a brand. This can be measured in a variety of ways, most often in changes to brand awareness, consideration and sales, as well as via non-conscious or biometric methods.
Check-Ins	A type of content on social platforms where a user shares their particular location.
Completion Rate	Of the total number of users who start an online video, the percentage who view the entire video from beginning to end.
Content Engagement	Any form of interaction with social media content.
Conversions	Actions taken in response to a commercial message, such as sharing, downloading, registering, applying or clicking to purchase.

Cost per Incremental Lead (CPIL)	The average cost of all leads that would not have been generated in the absence of a paid campaign. If measured with an exposed group, it is the cost of the social media buy, divided by the difference between the leads generated by the exposed group and the leads generated by the control group.
CTA Metrics	Metrics that reflect users' response to a Call-to-Action (CTA) within an advertising message.
CTR	Click-through rate: The percentage of those served an ad who clicked on a link within it.
Emotion	A measure of the types and ranges of feelings expressed in social media posts, beyond their positive or negative valence.
Engagement	An indication of users' response elicited by content or advertising message, beyond their mere exposure to it.
Favorability	A measure of the degree to which consumers feel an affinity for a particular brand.
First-Party Measurement	Audience data that a company collects directly from its audience. First-party data in social media usually comes from the platforms themselves or from verification vendors.
Impressions	The total number of exposures to a campaign, creative asset, advertising message or piece of content, including all of the times in which all of the individuals were exposed.
Incremental Reach	The number of target consumers exposed to a campaign, message or content who would not have been exposed had a certain designated action not been taken.
Incrementality	The measure of behavioral change, in addition to the change that would have naturally occurred had there not been any media or marketing activity.
Intent	A measure of a consumer's intention to purchase a product or apply for or register for a service.
Incremental Return on Advertising Spend (iROAS)	The ratio of total incremental revenue—revenue realized by a campaign that would not have been realized if the campaign had not occurred—to total expenditures on that campaign. If measured with a control and an exposed group, it is the additional amount the exposed group drove in revenue, relative to the control group, divided by the ad spend.

Leads	The names and/or contact information of individual prospects for new customers, based on some expression of interest. Some platforms can automatically forward leads to the advertiser.
Marketing Mix Modeling (MMM) or Multi-Touch Attribution Analysis (MTA)	Statistical techniques for parsing out the impact of spending on particular advertising channels, tactics, placements and creative executions on an outcome of interest, such as customers, registrations, applications, revenue or sales.
Owned Analytics	Analysis of audience, usage or conversion data from social media accounts that are proprietary to the owner of that account.
Page/Profile Engagement	Engagement with the owned social media property itself, rather than with any specific piece of content.
Reach	The total, unique number or percentage of individuals who receive a piece of media content or a commercial message, regardless of the number of times they are exposed to it.
Recall	Measures of memory used as an indicator of exposure, awareness or knowledge of a brand, ad, campaign or specific message or offer.
Sentiment	The direction of the attitudes consumers express about a brand in social media posts, typically quantified as positive, negative or neutral. May also be used more broadly as measure of tone and theme in social posts.
Social Media Listening	An approach which monitors users' posts on social media platforms
Social Media Performance	Indicators used to determine how well social media content, campaigns or strategy achieve its audience goals.
Social Media Platform	An online platform people use to build social networks or online relationships with other people who share similar personal or career interests, activities, backgrounds or real-life connections. Social media platforms come with an initial set of metrics that can be leveraged to track their performance and provide performance guidance (referred to as "native metrics").
Story	A story is content that expires after a certain amount of time.

Story Metrics	Indicators of audience behavior around social media stories.
Third-Party Measurement	Audience data on social media that is collected by a company other than the social media platform, which can only be obtained through partnerships or licensing agreements with other companies.
Uniques	The net number of unduplicated units or individuals who have been served or exposed to content, a campaign or a message, counted only once -- even if they have been served or were exposed multiple times during a reporting period.
Upper Funnel vs. Lower Funnel	The stages of a customer's buying journey that span measures of attitudes about a brand (upper funnel) to the actions the customer takes nearer to—and including—the actual purchase (lower funnel).