The Power of Like Europe

How Social Marketing Works for Retail Brands

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Executive Summary

The following white paper is based on a collaboration between comScore and Facebook and is a follow-up to the original Power of Like study conducted in the US in May 2011 and Power of Like 2, published in June 2012. The findings are largely based on data from comScore Social Essentials™ and Action Lift™ products.

With a focus on Europe, this study illustrates how popular consumer brands are utilising Facebook to deliver media impressions at scale, achieve brand amplification and resonance, and ultimately drive desired behaviours amongst key customer segments.

The study analyses the social marketing efforts of retail fashion brands across the three largest advertising markets in Europe (UK – ASOS and Topshop; France – La Redoute and Zara; Germany – H&M and Zara.) Retail was selected because there is heavy cross-visitation between the Retail category and Facebook, and eighty-six of the Top 100 e-Retailers ranked by comScore in Europe have established Facebook Brand Pages.

Below is a summary of key findings and implications of this study:

1. Europe is one of the largest markets for social networking, with an engaged user base accounting for a larger proportion of total minutes on social networking sites than any other region. The time spent social networking in Europe continues to grow at a healthy pace of 17 percent year over year (comScore MMX, May 2012).
2. On Facebook in the UK, France and Germany, 32 percent of a user's time is spent on the Homepage, which features the Newsfeed. The Newsfeed represents the primary location where branded content is consumed. However, despite the dominance of consumption in the Newsfeed relative to the brand page, a relatively small portion of Fans see content from a brand in a given week (across retail and other categories)
3. Impressions directed toward Fans, which if "Liked" are subsequently seen by Friends of Fans on their Newsfeed, can successfully expand a brand's reach and create a new audience with which to engage. European retail brands such as ASOS, H&M and Zara have the ability to disseminate marketing messages to up to 44 Friends of Fans for every Fan the brand has on Facebook.
4. Friends of Fans often have slightly different demographic profiles to the core Fan base of a brand. Understanding where the differences lie provides brands the ammunition to strategically target these demographics to drive them into the physical or online stores.
5. Fans of retail brands and across all categories often represent a brand's best customers. For the retailers studied, both Fans and Friends of Fans were disproportionately more likely to visit the brand websites – where purchases occur – compared to the average internet user.

For example, ASOS fans were 3.6x as likely to visit the ASOS website as non-fans, which may be expected given their stated affinity for the brand. Friends of Fans were 2.7x as likely to visit the site as well.

6. Using paid media to leverage the potential of earned properties such as the Facebook Brand Page yields positive ROI. Using an exposed versus control test, Facebook paid advertising generated a 130% uplift in purchase behaviour on the ASOS website in the four weeks following ad exposure. This is relative to those consumers who were not exposed and importantly demonstrated a similar affinity to ASOS as the test group (e.g. site visitation and purchase) in the four weeks prior to the advertising campaign.

Background

In Europe, social networks have emerged over the last few years to impact the way people relate, interact and share experiences and influence others on a daily basis. For retailers, this shift has represented an opportunity to engage their consumers in a more social environment. Many global retail brands have established a social presence in order to engage with their fans, shape their customers' experiences, and leverage peer influence along a shopper's journey from discovery, consideration, purchase and recommendation. As a result, retail is being transformed worldwide with prominent European brands leading the charge.

Even before the introduction of social media, retail was transforming at breakneck speed making the consequences of not staying in step with technological evolutions unprecedentedly high in a sector that has grown increasingly competitive over the past decade. Across the globe, the growth of e-commerce has been exponential and the pace of European e-commerce sales is expected to exceed that of the US by 2016.[1] Adding to that complexity, retailers are also responding to the channel opportunity presented by an increased number of consumers shopping with mobile devices. Mobile e-commerce is surging in Europe with year-on-year growth rates more than doubling across the UK, France, Germany, Italy and Sweden. [2]

As these new forces in retail evolve, the sector has explored the potential of social integration to drive business value but retail marketers struggle with social measurement. In a study of retailers that was conducted worldwide by The Economist, only 4% of senior executives say "they have advanced metrics in place that can tie social media campaigns directly to retail sales."[3] As social media continues to play an increasingly important role in online engagement, marketers will increasingly require high quality measurement of the channel's impact on consumer behaviour.

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[1] By 2016, US e-commerce sales will grow by 62% (to USD 327 billion) while in Europe growth is expected to grow by 78% to USD 230 billion (Source: Forrester, February 2012).
[2] (Source: http://www.warc.com/LatestNews/News/Mobile%20commerce%20to%20surge%20in%20Europe.news?ID=29423)
[3] http://www.eiumedia.com/index.php/latest-press-releases/item/67-retailers-struggle-mightily-to-measure-social-media-investments-says-new-economist-intelligence-unit-research

comScore has long championed research that helps marketers understand how to navigate the often complex digital advertising landscape. Studies such as comScore's 2008 white paper 'How Online Advertising Works', and the 2010 follow up 'Whither the Click in Europe' have sought to explain that marketers are over-valuing the click and illustrated why engagement rates on display ads (i.e. click-throughs) are a poor indicator of how that ad performs. Evaluating based on clicks-throughs ignores the branding impact of the vast majority of exposures that occur for every one exposure eliciting a click. Exclusively focusing on engagement rates in social marketing can, too, be similarly short-sighted.

The original Power of Like study argued that although there are numerous metrics to measure the volume of social networking activity there is little that goes deeper to understand the actual recipient of the message. Our research identified that an approach that is focused on *the audience* of branded content on social platforms – namely, audience reach and frequency – can unlock a much better understanding of the true impact of social media impressions. This approach is beneficial because it allows brands to focus on marketing activities that drive scale within audiences of interest. Additionally, it provides brands the opportunity to understand the profile of those audiences reached with various types of content, and to begin to understand the impact of that content exposure.

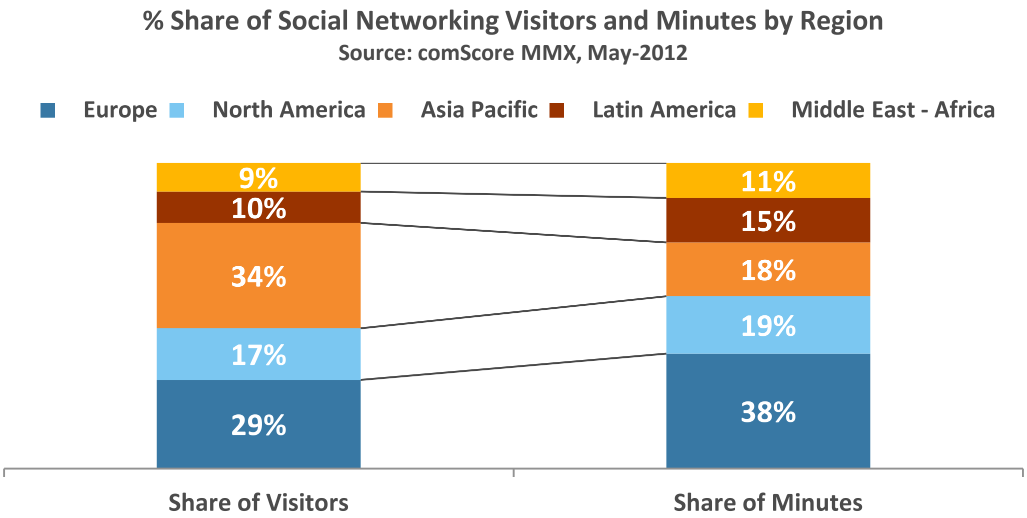
Importantly, an approach focused on audience reach and frequency would also serve to integrate brand activity on social platforms with other parts of the marketing mix since reach, frequency and GRPs are standard units of measurement across most media channels, including TV, online, radio and print.

This report aims to complement the previous Power of Like research by providing similar examples and analysis for the European market while highlighting implications for the retail category.

Social Networking Takes Hold in Europe

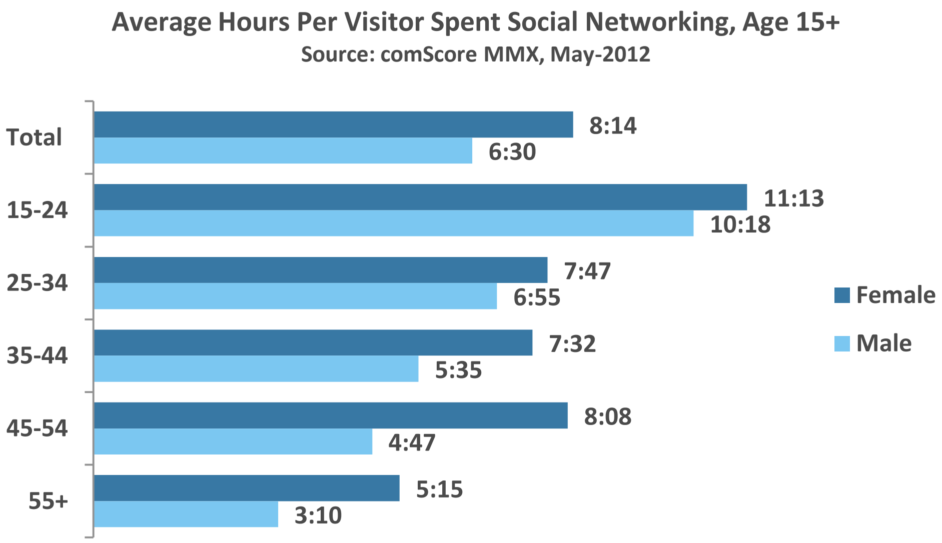
Europeans Are Highly Social

Relative to other regions, not only is Europe one of the largest markets for social networking, but it's also more engaged with a larger proportion of total minutes spent in the European region versus other regions. The time spent social networking in Europe is growing at a healthy pace (+17 percent) year over year and is displacing portals, email and instant messenger providing a new way for consumers to connect and share.



It's Not Just Young People Being Social – It's Everyone, Especially Females

A demographic analysis of social networking in Europe found that this is an activity enjoyed by all ages. Usage of social networking across every demographic group mirrors the overall internet average without any significant overrepresentation to the young. Usage patterns do vary by gender, with women spending nearly 2 hours more per month social networking than males.



Advertisers Test Social Platforms

Advertisers are placing an increasing amount of trust in the brand building power of social networks with, for example, over 1 in 4 display ad impressions appearing on social networking sites in the UK, over 1 in 5 ads in France and nearly 1 in 3 ads in Germany[4].

Socially-Published Advertising

Socially-Enabled Advertising

There is also a growing trend of using “socially-enabled” ads, which direct consumers to a brand’s social presence rather than a corporate website. Over the past holiday season in Dec 2011, for example, as much as 10 percent of all display impressions in the UK directed traffic to a social networking site. The trend has remained the same through to May of this year.

These actions indicate a growing reliance of brands on social media to help them make connections with their loyal fan base and utilise their fan networks to connect with like-minded prospective customers.

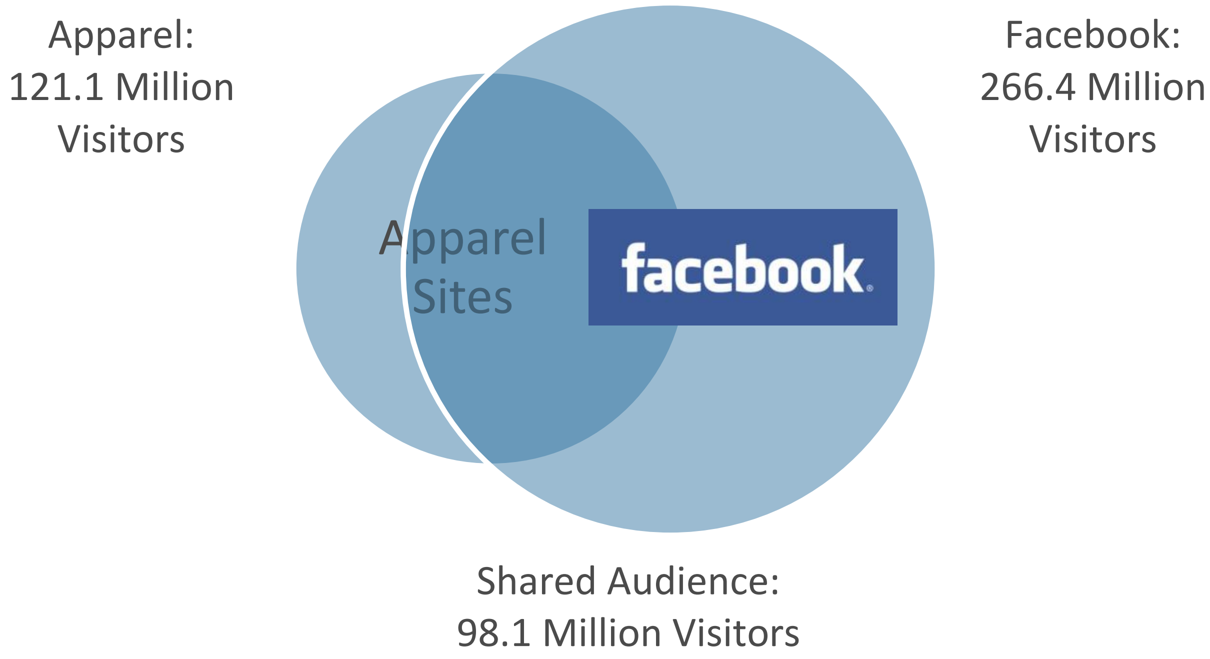
Making a Connection between Facebook and the Retail Category

In recent years as social media has emerged as a powerful marketing and advertising platform in Europe, retailers have amassed large social constituencies on Facebook to continuously communicate and deliver branded content to their core brand advocates. Demonstrating the importance the channel places on social media integration, 86 percent of the comScore’s top 100 e-Retailers in Europe have established Facebook pages for their brands.

[4] Source: comScore Ad Metrix Social, May 2012

A deeper analysis of the Facebook audience in Europe uncovered a strong connection between the Retail sites and Facebook with especially high cross-visitation observed in retail sub-categories such as Apparel, Books, Music, Sporting/Outdoors and Luxury Goods, for example. Apparel (or Fashion) had the largest audience among these sub categories with more than 120 million visitors, equating to a reach of 30.8 percent and just under half of Facebook's audience.

Facebook.com and Apparel Sites Cross-Visitation, Unique Visitors (Millions)
Source: comScore Media Metrix, Europe, May-2012



While 30 percent of the overall online audience visit apparel sites, nearly 40 percent of Facebook's audience do as well (Index =120), which can be interpreted that a Facebook user is 20 percent more likely to visit an apparel site than the average online user. The shared audience of 98 million visitors between Apparel and Facebook was an impetus for the brands selected in this study and in our opinion underscores the importance for retail brand marketers to understand Facebook's potential for reaching, engaging and converting prospective customers.

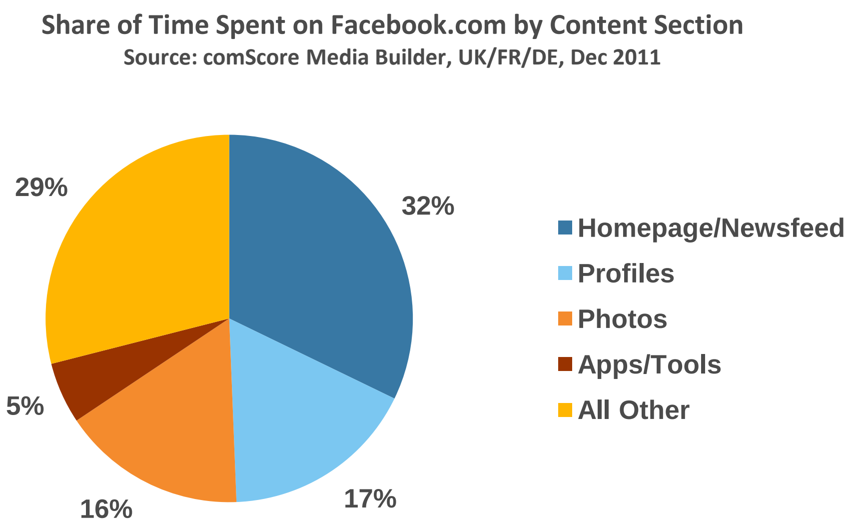
Understanding Facebook Engagement in the UK, France and Germany

In this white paper, we will examine Facebook's impact for a set of leading retailers across the UK, France and Germany, the three largest online advertising markets in Europe. The retailers, ASOS, H&M, La Redoute, Topshop and Zara have been chosen based on the size of their Facebook fanbases combined with their positions in either their local market or as significant brands across each of the three markets studied.

We will examine how these brands' marketing messages reach Fans and Friends of Fans throughout the network and the resulting implications of these social media brand exposures. We have specifically focused on the month of December when visitation to Retail sites is at its highest throughout the year.

The Role of the Newsfeed in Driving Engagement

As was highlighted in the original Power of Like study, US consumers spend most of their time on Facebook on their Homepage, which contains the Newsfeed and continually provides users with a list of updates of stories from friends, brands and applications. The trend holds true in the UK, France and Germany, with nearly a third of time on Facebook spent viewing the Homepage/Newsfeed. This trend is extremely important for brands that have developed brand pages and invested energy in creating a dialogue with their fanbase through the continuous posting of relevant content.



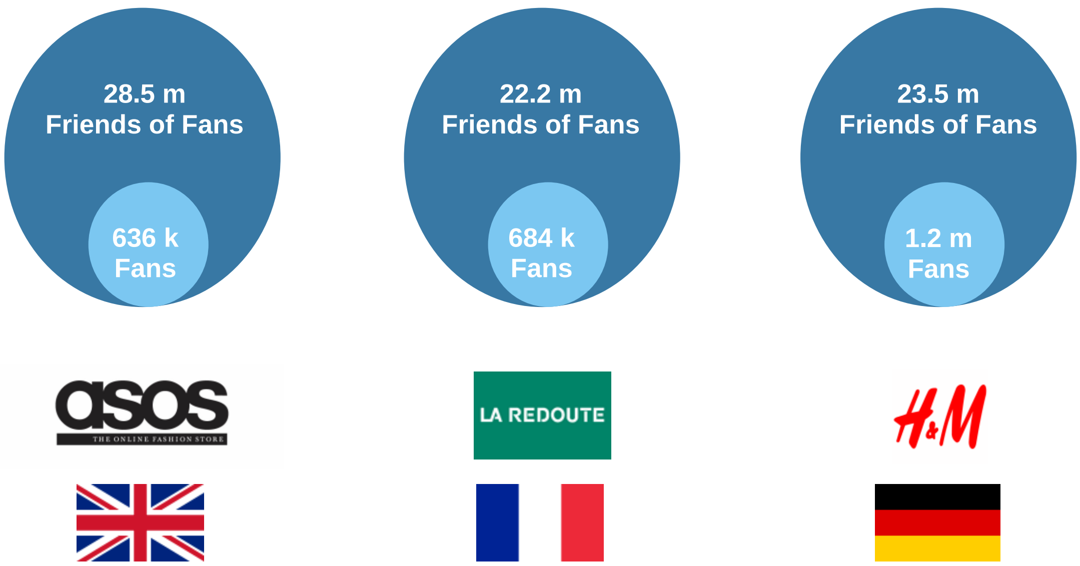
In the world of retail, when a user "likes" a brand they can receive information on new products, photos of this season's new line, and promotional offers all aimed at encouraging interaction such as sharing and ultimately action such as purchase. When a user "likes" a post from a brand it is shared within their network on their Newsfeed.

If the posted information appeals to their friends (Friends of Fans) and they subsequently like the post it can cause a chain reaction of communication appearing on a multitude of Newsfeeds and thus the “Power of Like” begins. This cascade of information means that brands can not only speak to their most loyal fans but also engage with their wider social network. As some retail brands have more than 10 million “likes” there is considerable opportunity for brand amplification amongst potentially a very wide audience.

Friends of Fans: Extending the Social Influence of Fans

When a user “likes” a brand, it opens up a channel of communication that can be highly beneficial and influential. The original Power of Like study asserted that Friends of Fans represent a substantial potential audience for brands. This is based on a Facebook analysis of the top 100 brand pages, which suggests that for every Fan, there are an additional 34 Friends of Fans that can be reached (differences exist by brand). This multiplier grows even larger to 81 Friends of Fans when examining the top 1000 Brand pages.

To illustrate the scale of potential audiences in Europe, retail brands such as ASOS have the ability to disseminate marketing messages to nearly 44 Friends of Fans for every 1 ASOS fan within the UK. Similarly, Friends of Fans for La Redoute in France and H&M in Germany represent a significant audience – 20x to 30x greater than their Fan base alone.



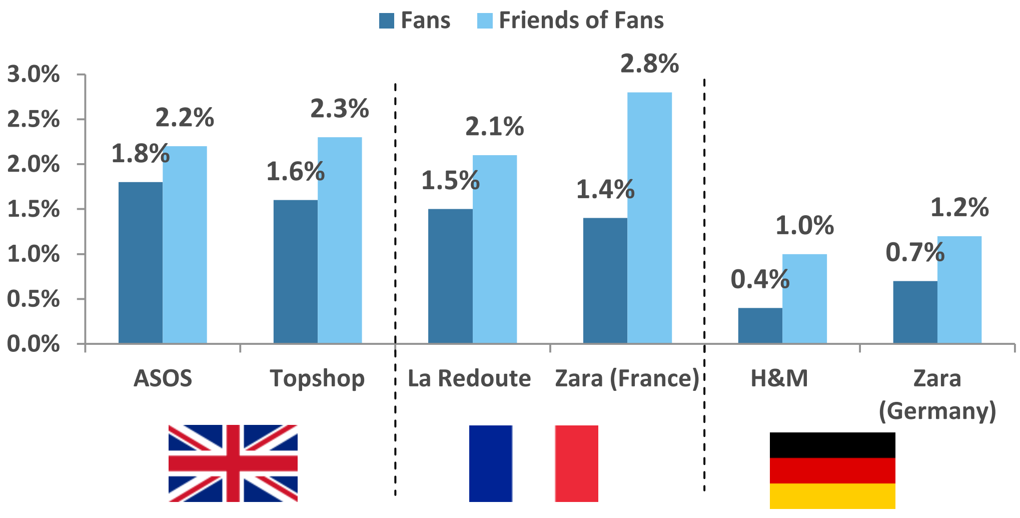
Most advertisers, regardless of geography or category, will maintain that reaching a brand's target audience is fundamental to marketing success. Brand Pages offer an efficient reach vehicle to reach friends of fans.

However, there are a number of challenges for any brand to take advantage of this network effect. The first issue is the frequency of posting. With different levels of usage throughout a day, week or month by Facebook users, it's possible that a brand fan will have missed the latest post. A fine balance needs to be struck between a frequency that inspires engagement versus one that makes the brand feel overexposed. A second challenge is to publish content that is compelling enough for users to share. Retailers who have e-commerce sites are at a particular advantage in this respect as they can share promotional offers that can be immediately redeemed.

Also important to understand is that despite the dominance of time spent on the Newsfeed relative to the brand page, a relatively small portion of Fans are exposed to content from a brand in a given week. In the 2011 Power of Like paper, a Facebook analysis indicated that, on average, 16 percent of Fans are reached by branded content by a brand that posts five out of seven days. Additionally, the Facebook Newsfeed prioritises content calculated to be most relevant to a user by using an algorithm that ranks content most likely interest to a user.

Despite potential obstacles to content being shared, our European study supports the original US findings that impressions directed toward Friends of Fans can successfully expand a brand's reach and create a new audience with which to engage. All five brands analysed across the UK, France and Germany in this study demonstrated that the reach of Friends of Fans exposed to social media impressions exceeded that of Fans alone. The 2011 holiday season saw particularly strong performance from Zara in France and H&M in Germany where the reach gained from Friends of Fans was double that of their Fans.

Total Internet Reach (%) of Social Media Impressions on Facebook
Source: comScore Social Essentials, UK/FR/DE, Dec 2011



Social Media Reach, Frequency & GRPs

Facebook has become one of the most important channels for digital marketers to understand and utilise, particularly given the number of users across Europe. As investment in online media, whether in staff or advertising budgets, continues to grow there is benefit in being able to compare Facebook activity to other media. To enable these cross-media comparisons, social media brand impressions can be quantified and translated into traditional media planning variables such as reach, frequency and gross rating points (GRPs). We calculated these metrics for the retail brands studied based on the number of social media brand impressions delivered against Fans and Friends of Fans.

Boosted by a high frequency of exposure amongst Fans, ASOS delivered the largest combined GRPs amongst the brands studied at 34.2 GRPs. H&M in Germany grossed the lowest total GRP score of 4.7 despite having more than doubled their Total Internet Reach via their Friends of Fans.

Unpaid Brand Impressions on Facebook - UK
Source: comScore Social Essentials, Dec 2011

	Exposed Users (000)	Impressions (000)	Average Frequency	Internet Reach	Total Population Reach	Total Population GRPs
FANS						
ASOS	781	13,070	16.7	1.8%	1.3%	22.4
Topshop	668	3,925	5.9	1.6%	1.1%	6.8
FRIENDS						
ASOS	944	5,047	5.3	2.2%	1.6%	11.8
Topshop	1,002	5,724	5.7	2.3%	1.7%	13.5

Unpaid Brand Impressions on Facebook - France
Source: comScore Social Essentials, Dec 2011

	Exposed Users (000)	Impressions (000)	Average Frequency	Internet Reach	Total Population Reach	Total Population GRPs
FANS						
La Redoute	705	6,026	8.5	1.5%	1.2%	10.0
Zara	651	2,570	3.9	1.4%	1.1%	4.2
FRIENDS						
La Redoute	1,012	6,227	6.2	2.1%	1.7%	10.4
Zara	1,316	11,917	9.1	2.8%	2.2%	19.9

Unpaid Brand Impressions on Facebook - Germany
Source: comScore Social Essentials, Dec 2011

	Exposed Users (000)	Impressions (000)	Average Frequency	Internet Reach	Total Population Reach	Total Population GRPs
FANS						
H&M	187	598	3.2	0.4%	0.2%	0.8
Zara	303	983	3.2	0.7%	0.4%	1.3
FRIENDS						
H&M	418	3,053	7.3	1.0%	0.5%	3.9
Zara	517	3,677	7.1	1.2%	0.7%	4.7

Social Media Audience Analysis

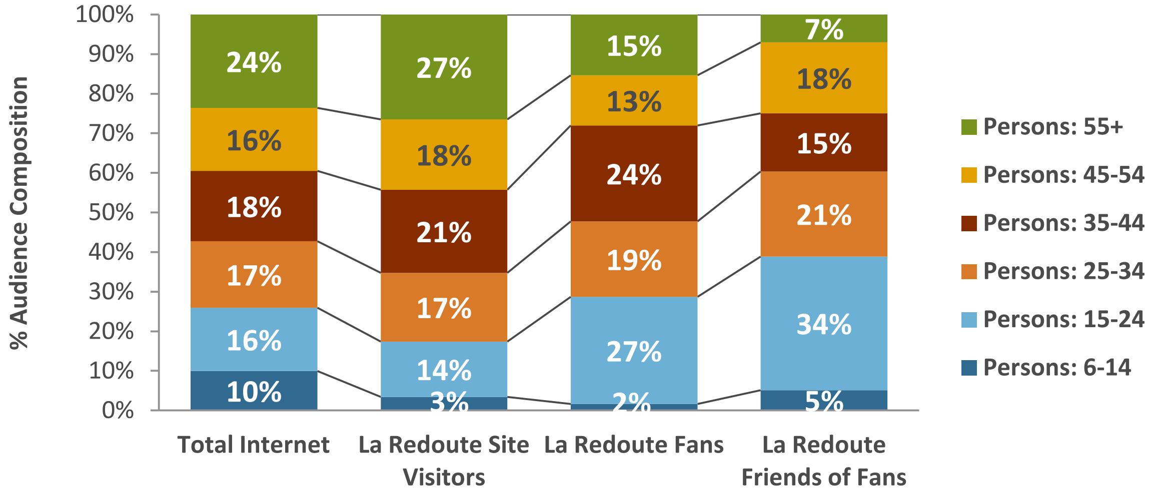
The analysis thus far has provided ample evidence of an amplification effect where impressions on Facebook reach not only Fans but their wider network as well. What is also important to understand is whether this wider network is very similar to their intended target audience or in fact a broader cross-section of the internet population. There is value in understanding if Facebook can help brands reach not only their most loyal users but also their lighter buyers that need more reason to buy.

Facebook Fan Network Expands Brand Audience

When looking at the demographics of the audience being exposed to a retailer's brand impressions on Facebook, it is interesting to see how this can differ from the overall user base online and, importantly, those users visiting the retailer's website. La Redoute in France, for example, over-index on older site visitors compared to the general internet population in France (45 percent of their users are 45+ years old versus 40 percent for the total internet population) and yet the profile of their Facebook Fan Network is different again.

When looking at La Redoute Fans, it is evidently a far younger audience than the general online population with only 28 percent over the age of 45. However, the Friends of Fans tend to be even younger with only 25 percent falling in the older demographic group. It may benefit La Redoute to take this into account when devising strategies to drive the younger consumers into either physical or online stores.

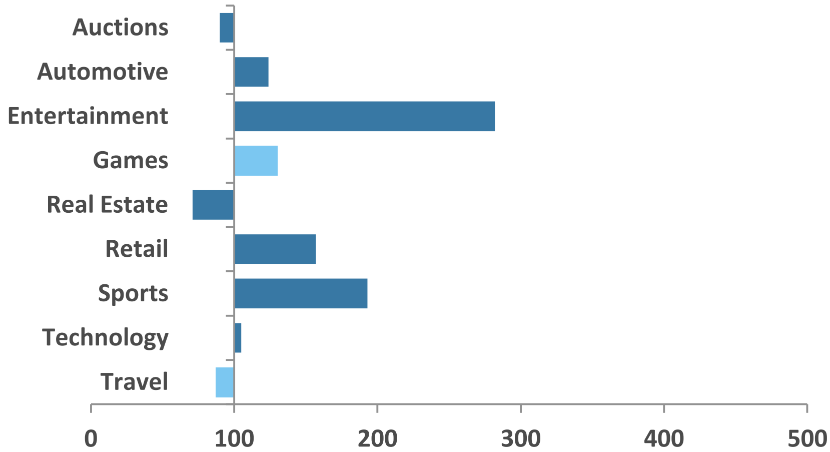
Demographic Profile of La Redoute Exposed Users vs. La Redoute Site Visitors vs. Total Internet in France
Source: comScore Social Essentials, France, Dec 2011



Identify New Targeting Strategies Based on Fan Behaviours

Another interesting analysis for marketers wanting to understand their Facebook audience is to look at the audience's online content consumption behaviours. We can often see that Fans online behaviour differs substantially to those of the average internet user. In the analysis below, we examined the percentage of time La Redoute's Fans spent in different site categories relative to the average internet user. The results indicated several strong behavioural skews amongst leading content categories. There was a very strong over-indexing of time spent on entertainment (282), sports (193) and retail (157) content. Contrast this with an under-indexing of engagement on auction sites (90), travel sites (87) and real estate (71).

La Redoute Brand-Exposed Fans:
Content Category Visitation by Time Spent Index
Source: comScore Social Essentials, France, Dec 2011



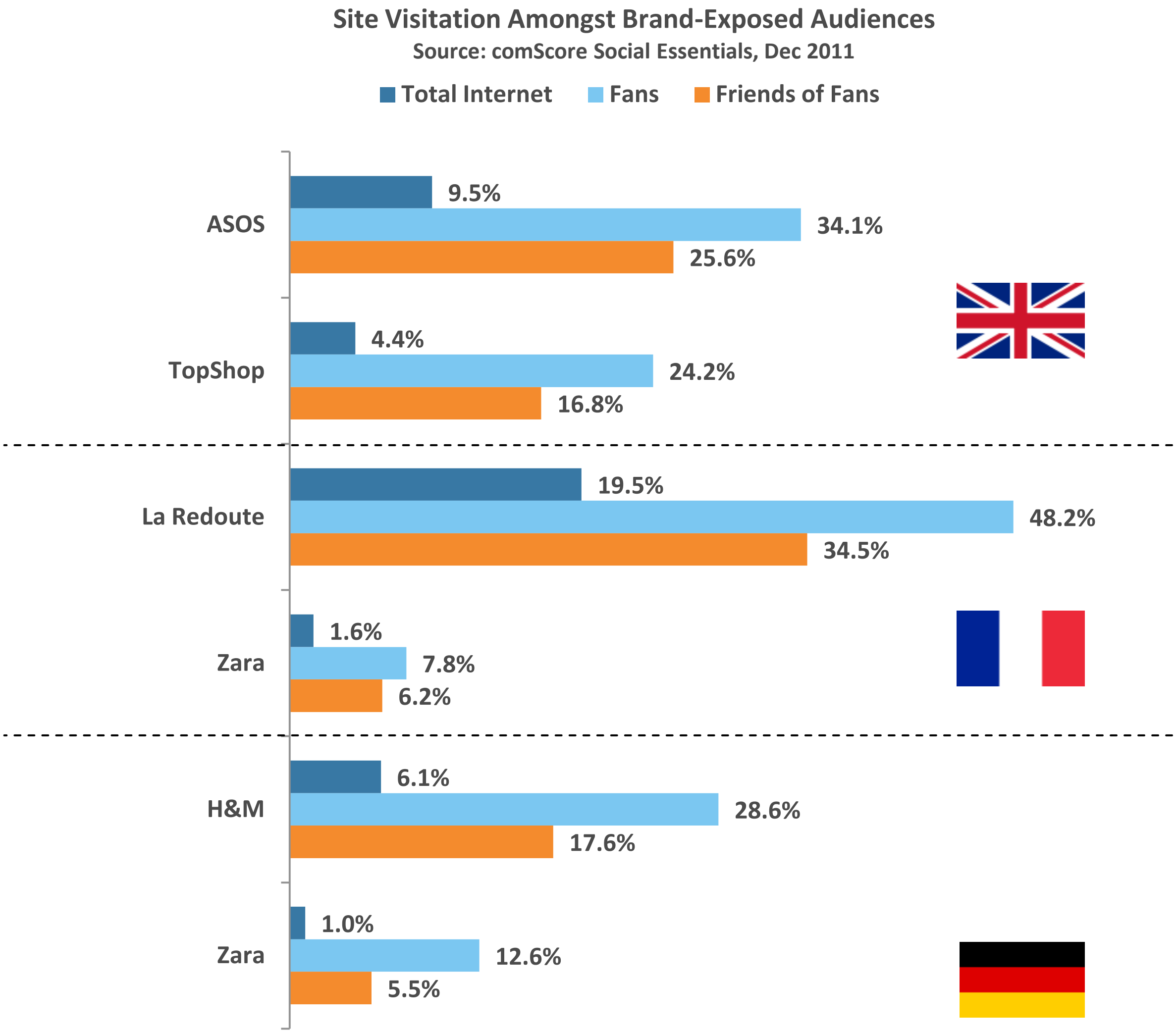
Information such as the above can help La Redoute, and other brands who have built a broad fan base, to better inform their marketing strategies such as developing social apps, tailoring media plans or identifying potential promotional partners to suit the identified behaviours of their Facebook Fan Network.

Fan Value, Potential and Facebook ROI

Perhaps the most common questions that arise in evaluating social media efforts are "What is a Fan worth?" and "What is the return on my Facebook investment?". A good starting point for quantifying the value of Facebook audiences is to analyse basic brand engagement.

For the retailers studied, we evaluated how much more likely Fans and Friends of Fans were to visit their brands' websites compared to the average internet user. In each instance, Fans and Friends of Fans are disproportionately likely to visit the retailer's owned media environment, the online store, compared to the average internet user.

Fans of retail brands and across all categories often represent a brand's best customers. For the retailers studied, both Fans and Friends of Fans were disproportionately more likely to visit the brand websites – where purchases occur – compared to the average internet user. This behaviour is especially evident for Zara in Germany, where the reach of the Zara site rose from 1 percent overall to over 12 percent amongst exposed Fans. Friends of Fans also demonstrated an affinity for the brand and were 5.5x as likely to visit the Zara site as compared to the average online consumer.



Heavy visitation from Fans and Friends of Fans is also evident for brands who already have a strong, existing online presence. This is demonstrated by La Redoute, whose reach jumped from 19.5 percent amongst all internet users to over 48 percent amongst exposed Fans. As referenced earlier in this study, La Redoute is able to reach a new and different audience through their Friends of Fans.

The ASOS fan base in the UK exhibited similar behaviours, where Fans were 3.6x as likely to visit the ASOS website as non-fans, which may be expected given their stated affinity for the brand. However, Friends of Fans were 2.7x as likely to visit the site as well.

From Amplification to Action

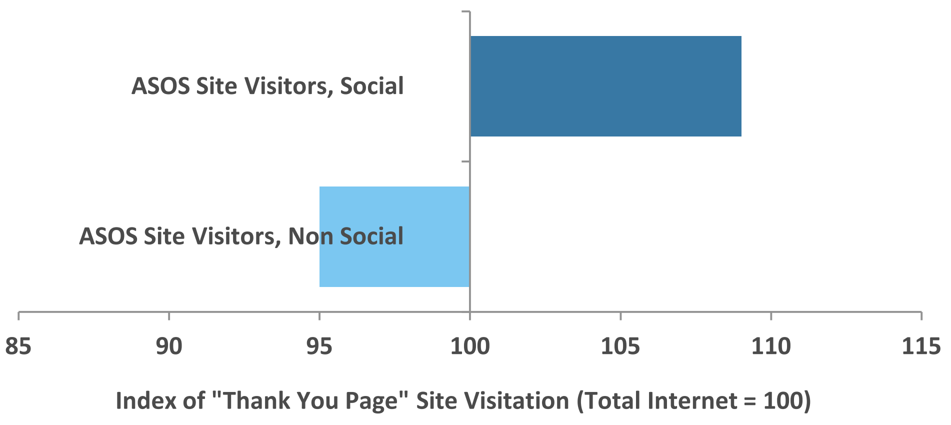
Throughout this white paper we have evaluated the incremental reach and diversity of audience that a brands' social network on Facebook can achieve. Higher rates of visitation of retail brand's Friends of Fans potentially point to a pre-existing receptivity of a wider audience for brand messaging, product information and promotions. As the Fan Networks of the selected retail brands in this study represent audience sizes in the millions, these brands are capable of marketing to consumers who exhibit lighter visitation patterns at impressive scale.

A final area of analysis that is often enquired about by brands is whether paid media and earned media on Facebook are effective at driving increased purchasing behaviour. To explore this further we have conducted two additional analyses, which provide further evidence that both social impressions and paid impressions on Facebook can drive action. We have used examples from ASOS to illustrate the case.

The first analysis examines the likelihood of making a purchase on the ASOS site for an ASOS Fan and Friend of Fan (ASOS Site Visitors, Social) compared to an ASOS Site Visitor that is not a Fan or Friend of Fan (ASOS Site Visitors, Non Social). The purchasing behaviour is identified through the ASOS.com Thank You page that is displayed post-purchase and the data below is indexed against the total purchasing audience.

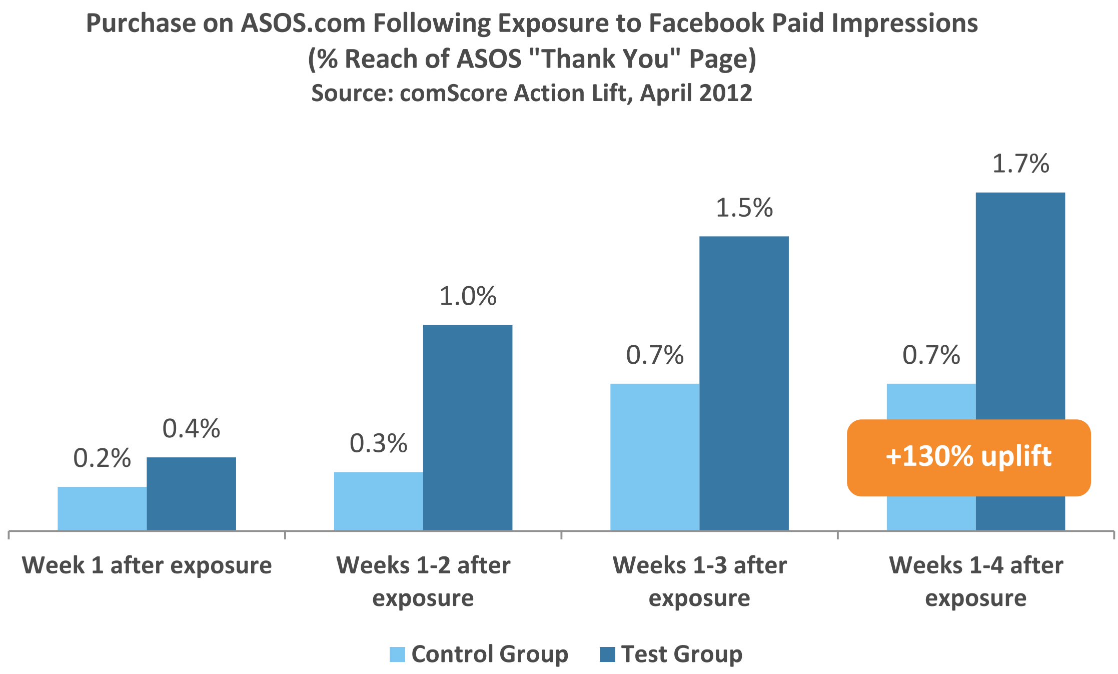
The below illustration shows that ASOS Site Visitors who are a Fan or Friend of Fan (ASOS Site Visitors, Social) are over 10 percent more likely to make a purchase on the ASOS site as compared to site visitors that are not within ASOS's Friend of Fan reach. While the below correlative data doesn't indicate the extent to which these differential purchase rates are attributable to media's influence, it reveals that Fans and Friends of Fans represent a group of shoppers shown to be within ASOS's consideration set of target consumers.

LIikelihood to Purchase on ASOS.com
Social vs Non-Social Site Visitors
Source: comScore Social Essentials, UK, Dec 2011



The ROI of Facebook

Our second analysis examines the likelihood of conducting a purchase on the ASOS site after exposure to a paid impression on Facebook. As with the above example, purchasing behaviour is identified through the ASOS.com Thank You page that is displayed post-purchase.



These results highlight the ability of Facebook paid ads to drive purchase in the weeks following exposure. In this campaign, 1.7 percent of those exposed to an ASOS sponsored ad on Facebook purchased from the ASOS site at least once in the four weeks after first exposure to the campaign; compared to only 0.7 percent of those not exposed to the campaign. Facebook advertising generated an uplift of 130 percent in purchase behaviour on the ASOS site. This is relative to those consumers who were not exposed and importantly demonstrated a similar affinity to ASOS as the test group (e.g. site visitation and purchase) in the four weeks prior to the advertising campaign.

Conclusion

Collectively, this research leads to three important conclusions for European brands. The first is that by focusing on measuring the reach of their branded content among various constituencies, brands can more effectively understand and optimise the way in which they leverage their presence on Facebook and understand the value that the platform provides. Secondly, we believe that brands can realise significant untapped benefits by understanding and focusing on reaching the Friends of their Fans, who can often be different in profile from their fan base. Lastly, brands can impact propensity to purchase through paid media on Facebook, as demonstrated from the ASOS example.

APPENDIX

Methodology and Definitions

Data in this paper was collected and analysed using the comScore Action Lift, Ad Metrix Social, Media Metrix and Social Essentials products, which are measurement services based on comScore's proprietary 2 million person global panel of internet users from a home or work computer (note: mobile-based internet browsing is not included in this analysis). Opt-in panelists provide comScore with explicit permission to passively observe their online behaviour, including site visitation, search activity and advertising exposure.

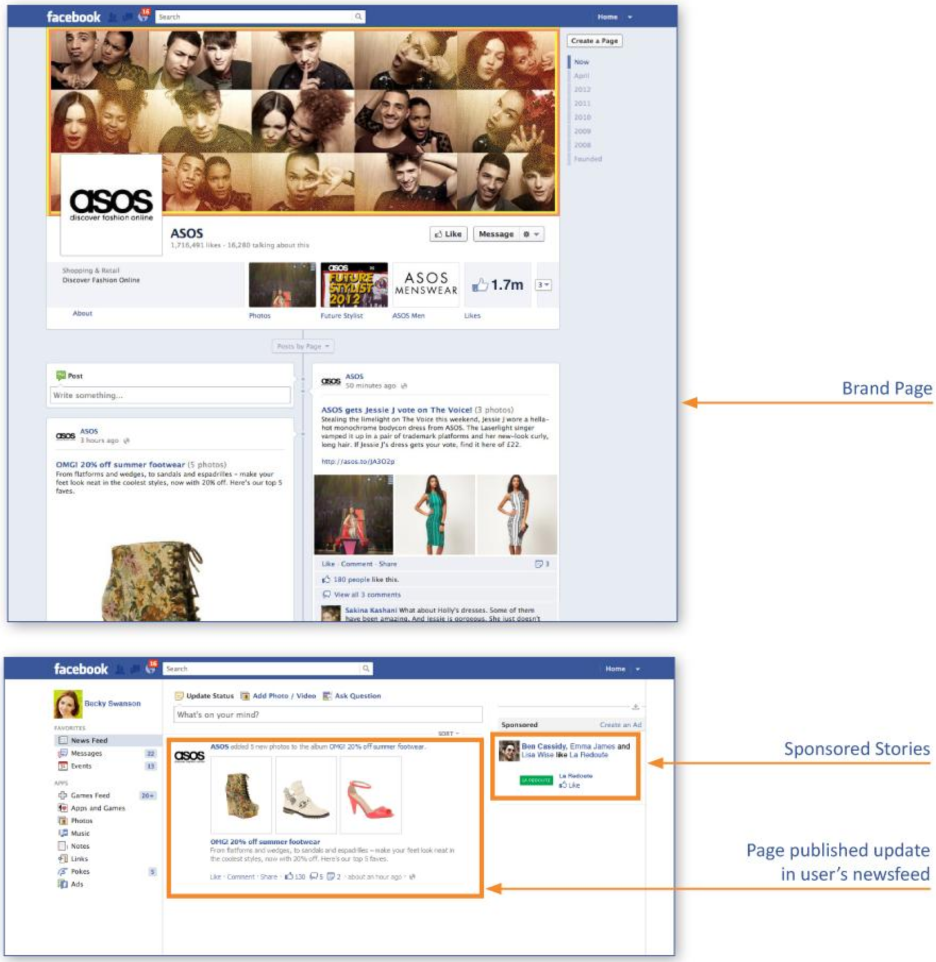
By measuring online behaviour for these opt-in panelists, comScore can observe both public and non-public pages within particular social networks such as Facebook. Measurement of panelists' exposure to social media marketing within social networks can be linked to other behaviours in which they engage around the web. In addition, certain select data points and illustrations in the paper are based on aggregate, non-personally-identifiable data sourced from Facebook.

Social Media Brand Impressions

In this paper, we describe a unit of branded content called a "social media brand impression." These impressions occur throughout a social network and may be delivered through a variety of dissemination channels. Below are the four primary vehicles through which these impressions are delivered:

1. Page Publishing – These unpaid impressions appear on the Brand Page and may also appear in the Newsfeed of a Fan or a Friend of a Fan.
2. Stories about Friends - These unpaid impressions occur when a Friend actively engages with a brand and become visible either on a Friend's wall or in the Newsfeed. These stories may appear to Fans and Friends of Fans.
3. Sponsored Stories – These paid impressions are similar to Stories about Friends, but they have been actively distributed more broadly and appear in the right hand column to Fans and Friends of Fans.
4. Ads with Social – These branded messages come directly from the advertisers with a social context on the unit that appears to Friends of Fans

While Social Essentials reports on all four of these impression types, this paper is focused specifically on unpaid, or earned, impressions.



Facebook Fan & Friend of Fans Segments

In this white paper, we will discuss a few different types of user segments within Facebook. While other analyses of Facebook Fans typically center on counts in the total number of accrued Fans, we instead measure audience segments within Facebook based on their exposure to brand impressions within the given reporting period (consistent with the comScore Social Essentials product). Moreover, not only are Fans exposed to these impressions, but so are their Friends. With this understanding in mind, we will make reference to the following audience segments throughout this paper:

- Fans – This user segment is based on users who have affirmatively stated their affinity for a particular brand by "liking" that brand. Over a given period, a subset of the total Fan base has been exposed to a social media brand impression.
- Friends of Fans – This user segment (aka "Friends") is defined as those who are not explicitly brand Fans but who are exposed to brand impressions through a Friend who is a Fan of a particular brand. Over a given period, a subset of the total Friends of Fans is likely to have been exposed to brand impressions.
- Non-Fans – This segment encompasses all users of the social network who have neither become a Fan of a particular brand, nor are they connected to a Fan.

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