

360° IMPACT OF SOCIAL MEDIA

by MRB Hellas SA

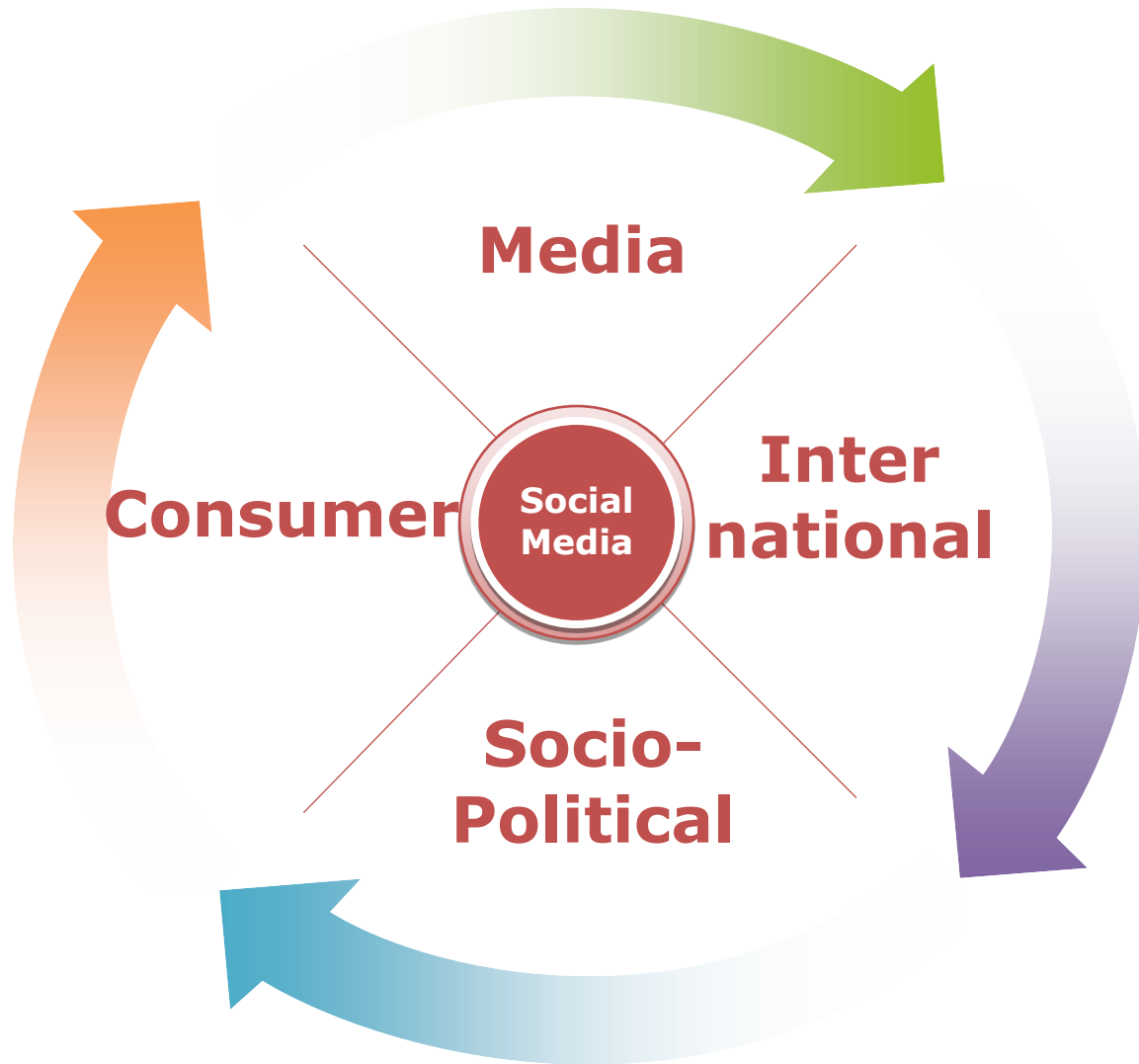
March 2011



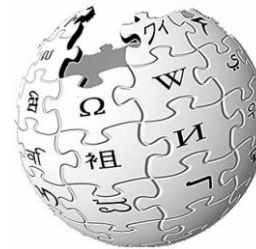
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HELLAS S.A.



360° Impact of Social Media



Almost everything has become digital



Social



Sharing (files, tastes, opinions...)
Social Interactions (groups, relationships...)

Media



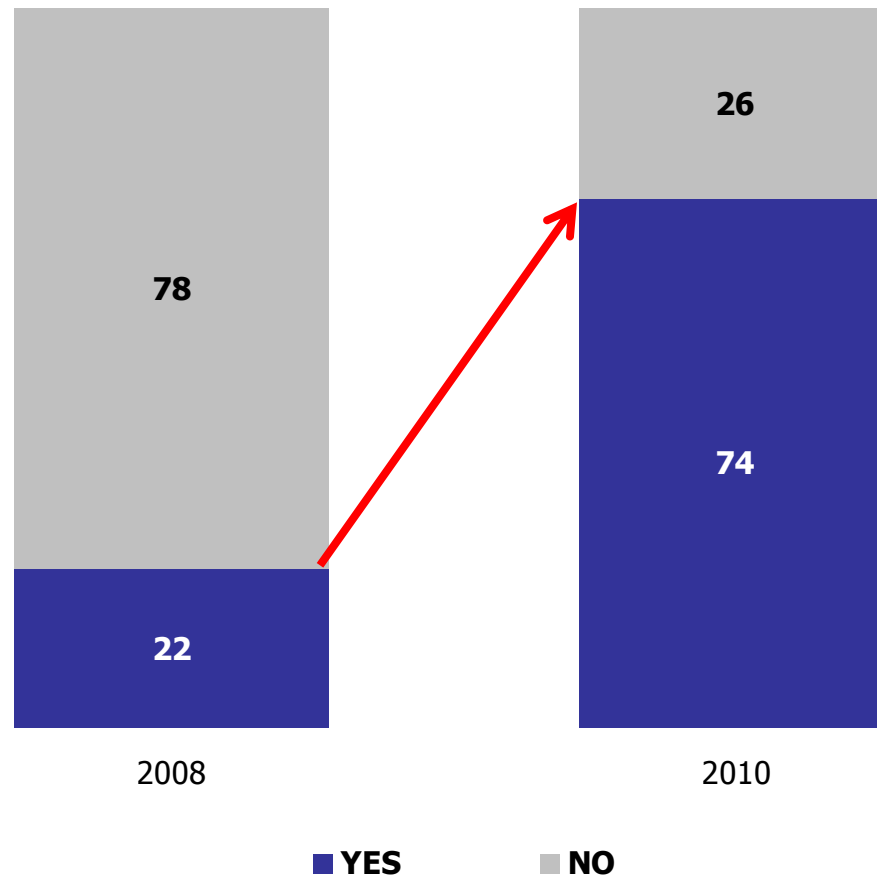
Media Places for
Publication

“Social Media are places, tools, services allowing individuals to express themselves (and so to exist) in order to meet, share...”

Publish - Share - Socialize

FredCavazza.net

•Have heard the term «Social Media»



%

Base1. Internet users Sample = 701
Source : TGI 2007 – 2008 / Re-contact Survey

Base 2: Total Internet users, N=1022



B. Have you heard the term social media?

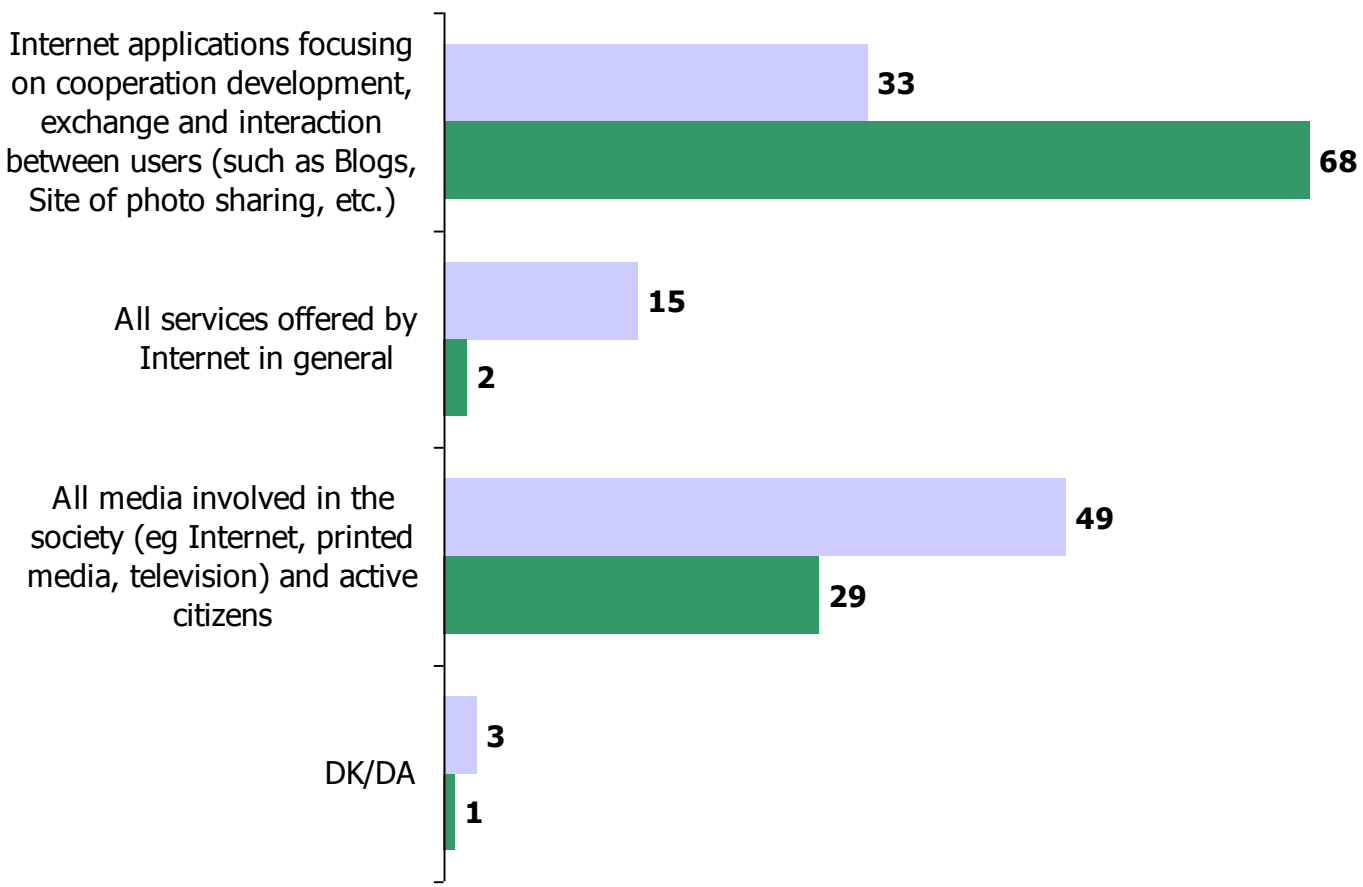
• What is Social Media?

Total users

2008 Survey
 2010 Survey

%

Only Internet



Base 1: Internet Users, Sample = 701 Source: TGI 2007 – 2008/ Re-contact Survey,
 Base 2: Total Internet users, N=1022

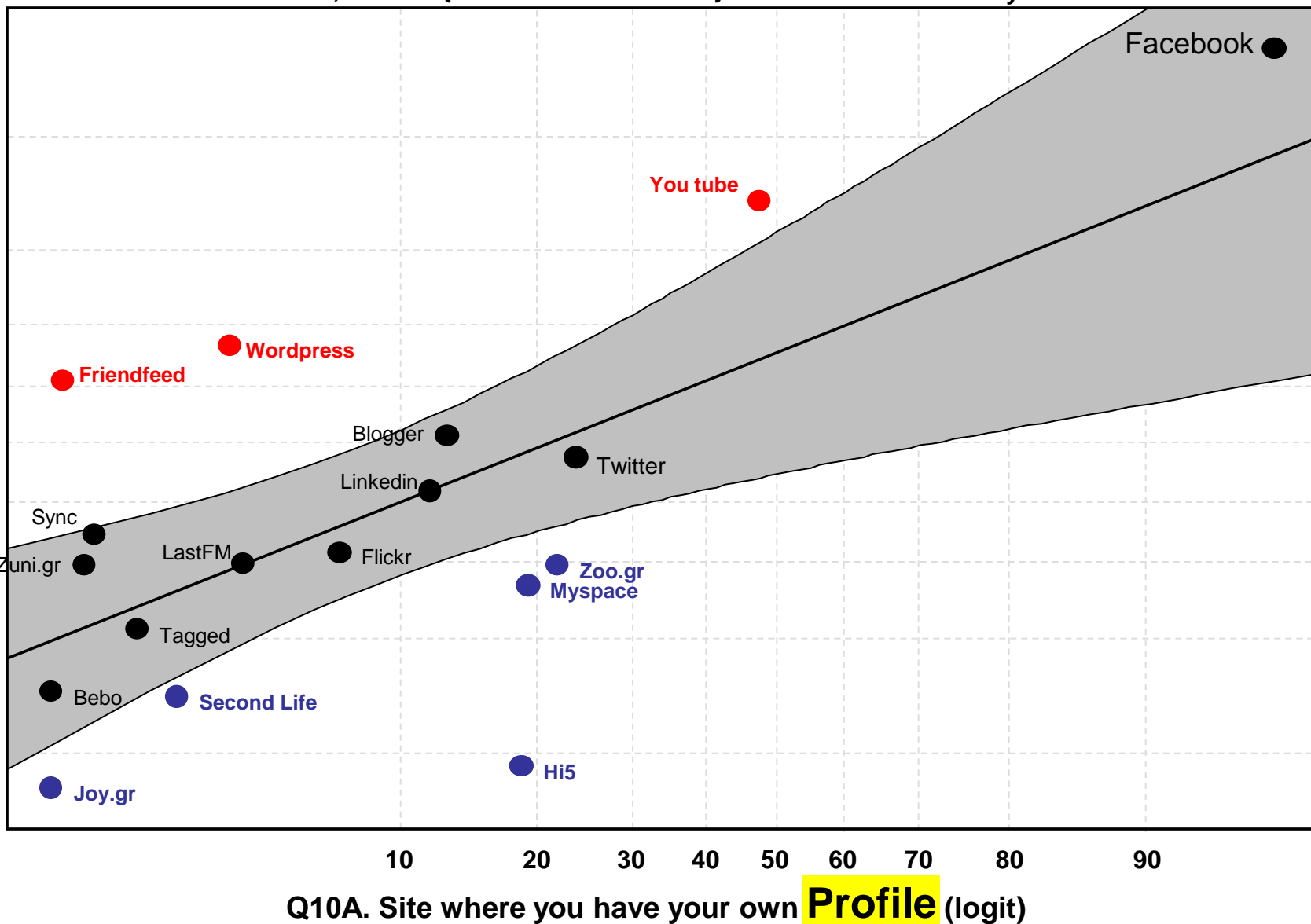
Γ. Which of the following do you think are the Social Media?
 NOTE CODE OR CODES THAT CORRESPOND MORE IN YOUR OPINION.



Transformed Data $r^2 = 0.44$; $r = 0.67$ {95% Confidence Band}

$y = 0.484375x + 0.648836$

Q10B. Visit 2-3 times per week + more often



Social Media

Social Media Landscape

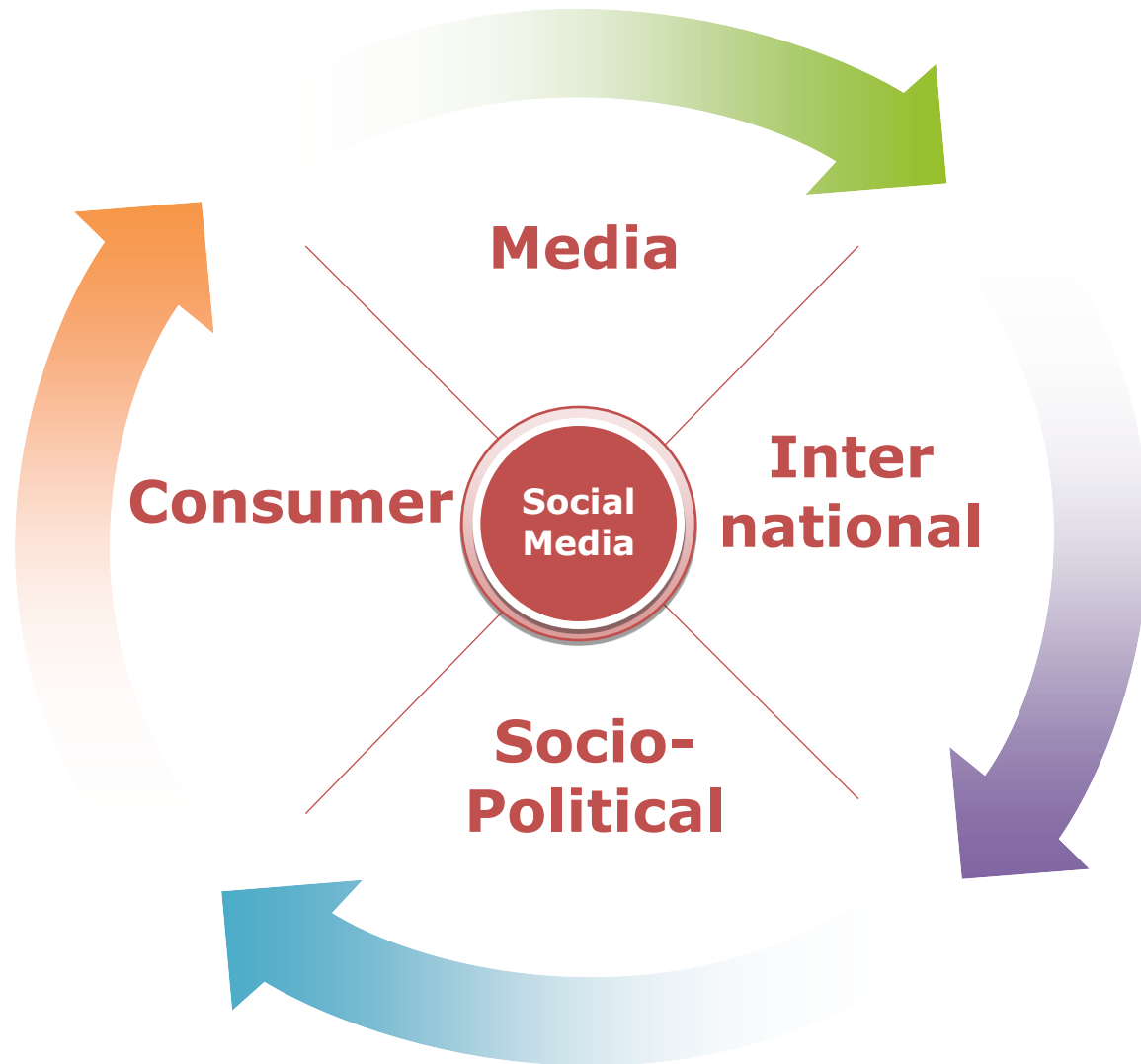


“Richness”

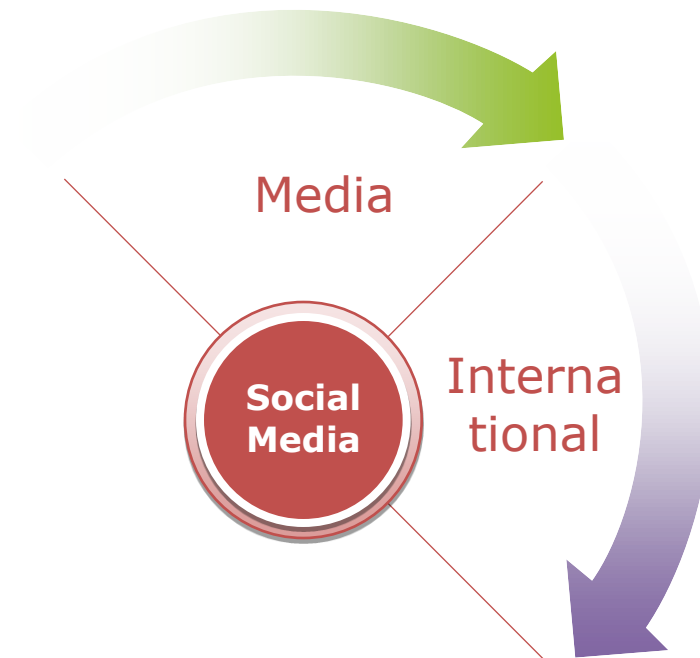
“Diversity”

“Fragmentation”

360° Impact of Social Media



360° Impact of Social Media



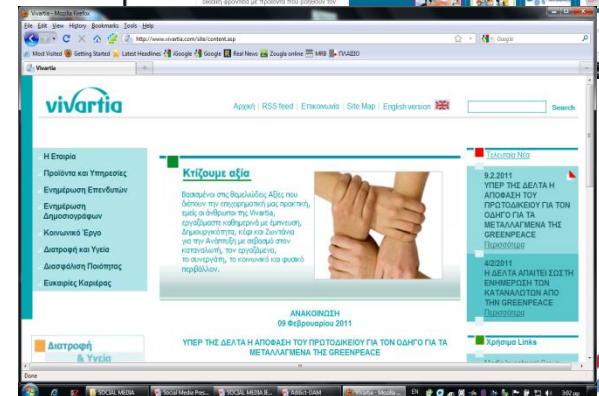
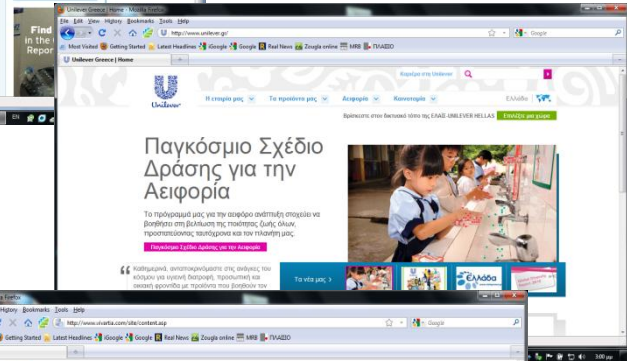
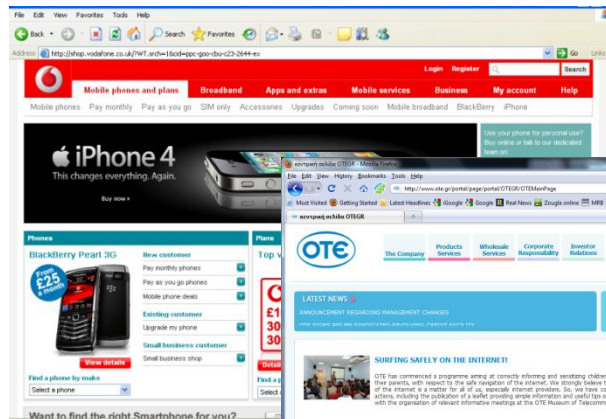
360° Impact of Social Media

- Media can now be described as ...
 - **“Owned”** Media
 - **“Paid”** Media ... by Brands
 - **“Earned”** Media



MEDIA

Owned Media



Paid Media

ΤΟ ΒΗΜΑ

Χ. Α. ΔΑΜΠΡΑΚΗΣ (1987-2009) ΕΠΙΣΤΗΜΟΝΑΣ ΣΤΑΥΡΟΣ Π. ΨΥΧΑΡΗΣ ΒΙΟΓΡΑΦΙΚΗΣ ΠΑΡΕΛΑΣΙΣ Ι. ΚΑΡΝΗΣ

Δήλωση Σόιμπλε: Η αλληλεγγύη δεν είναι μονόδρομος

Εκβιάζει η Μέρκελ με όπλο την τρίτη δόση

Η ΚΑΘΗΜΕΡΙΝΗ

Ημερήσια Πολιτική και Οικονομική Εφημερίδα

8 ΜΗΝΑ, 219 ΣΕΙΡΕΣ ΣΕ ΕΠΕΛΕΓΜΕΝΕΣ ΣΕΛΙΔΕΣ

Τρομάζει το χρέος των κρατών

Φόβος ότι οι εμάς παρά τους θα αποπειραθούν το ίδιο - Νέα προειδοποίηση Τρόικ στην Ελλάδα

Στον δρόμο προς τη Μέκκα, παρά την επιδημία



6ος ΣΥΜΒΟΥΛΙΟΣ
ΟΙ ΣΗΜΑΝΤΙΚΟΤΕΡΟΙ ΕΛΛΗΝΕΣ ΕΡΜΗΝΕΥΤΕΣ στα τραγούδια της **ΑΝΑΣ ΝΙΚΟΛΑΚΟΠΟΥΛΟΥ**

ΤΑ ΧΡΟΝΙΑ ΤΗΣ ΘΥΕΛΛΑΣ
Μόνος Καρτέρας

ΜΑΞΕΣ & ΑΥΞΕΣ
54.10 ΕΠΙΣΤΗΜΟΝΑΣ

Realnews www.real.gr
ΚΥΡΙΑΚΗ 20.3.2011
ΑΡΙΘΜΟΣ ΦΥΛΛΟΥ 123
Η ΑΛΗΘΙΝΗ ΕΦΗΜΕΡΙΔΑ
ΤΙΜΗ: 4,25 €

ΜΗΝΥΜΑ ΓΙΩΡΓΟΥ ΠΑΠΑΝΔΡΕΟΥ ΣΤΟΥΣ ΒΟΥΛΕΥΤΕΣ ΤΟΥ

«Ναι σε όλα» αληθώς εκλογές!

ΤΙ ΕΚΜΥΣΤΗΡΕΥΘΗΚΕ ΣΤΟΝ ΠΡΟΕΔΡΟ ΠΑΡΟΥΣΙΑ

«ΑΝ ΜΕΙΝΩ με 133 ή αν κερδίσω με 133, θα είμαι προσηφραματισμένος ως προσηφραματισμένος στις εκλογές»

«ΤΩΡΑ θα ρίξω όλα τα βάρη στον υπεύθυνο της κυβέρνησης. Δεν γίνεται διαπραγμάτευση»

«ΔΕΧΟΜΑΙ ΠΙΣΤΕΙΣ από την ώρα να δωθεί η Λαϊκή Καρδιά»

in.gr **10** **ΧΡΟΝΙΑ** **contra.gr**

QUATTRORUOTE.gr

ΕΡΕΜΑ

MEGA **ANT** **ALPHA**
ΣΚΑΪ **NET** **ET**
ALTER **MAD**

MUSIC TELEVISION

Grid of various radio and TV station logos including: Greek Webstream, Eledio B. Balkis, Adult Hit & Dance, KISS, MTV, etc.

Discovery CHANNEL

MRB HELLAS S.A. **MRB** **KANTAR**

Earned Media



Social Media and UGC: Friend or Foe?

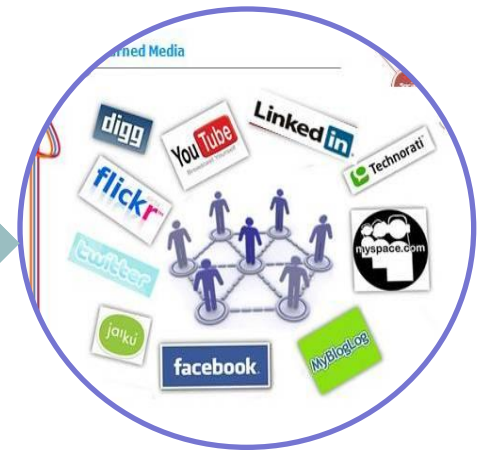
Owned Media



Paid Media



Earned Media

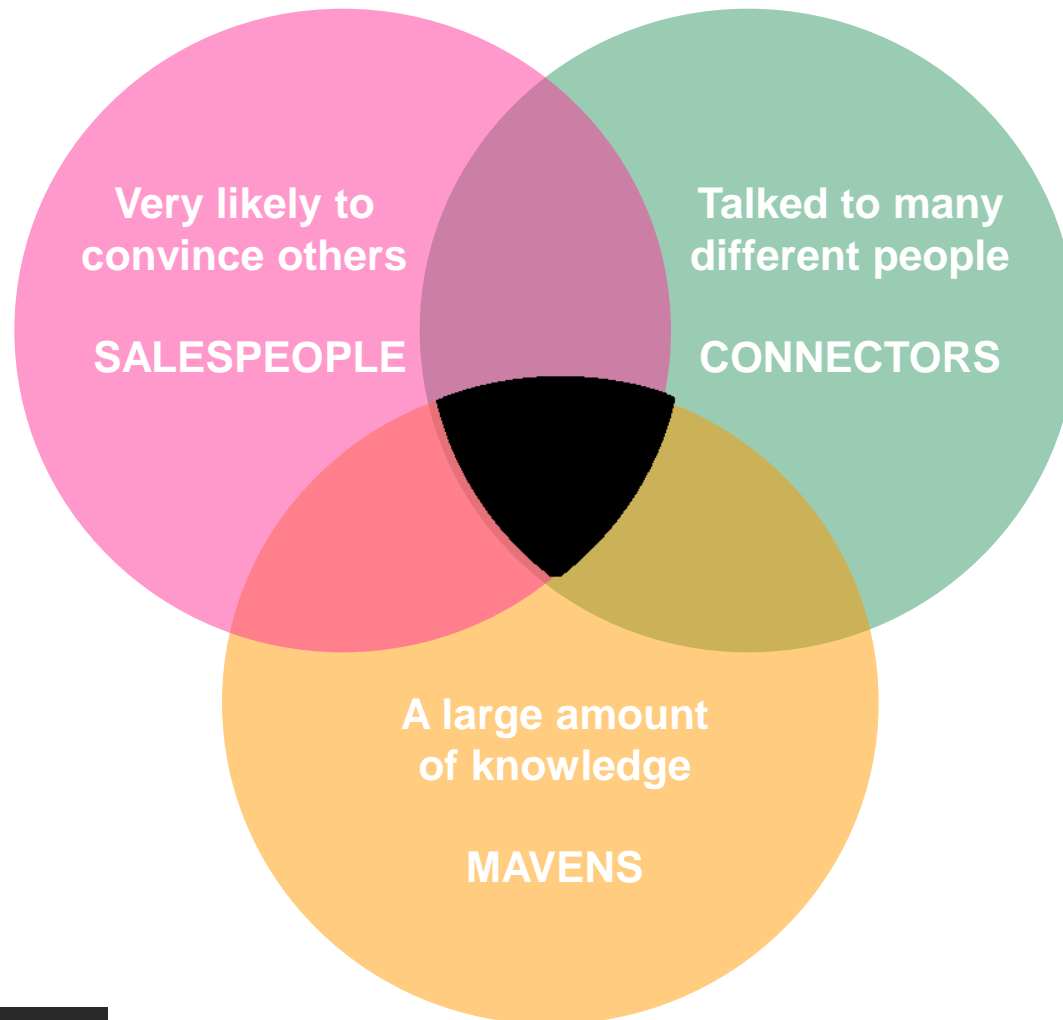


Can
Symbioses
be Created
Between ...
?

CONNECTORS, MAVENS, SALESPEOPLE

CHAMPTIONS

CONNECTORS + MAVENS + SALESPEOPLE



CHAMPTIONS CONNECTORS + MAVENS + SALESPEOPLE

Those who post comments / reviews online tend to be influential in terms of Word of Mouth..

	Connectors		Mavens	
	Index	Horz%	Index	Horz%
Posted comments / reviews online	149	69%	169	57%
Currently write a blog	116	54%	107	36%

Base: All adults

Source: GB TGI Net 2010 Q1

ONLINE EXPERTS MAGAZINE / ONLINE SYMBOSES

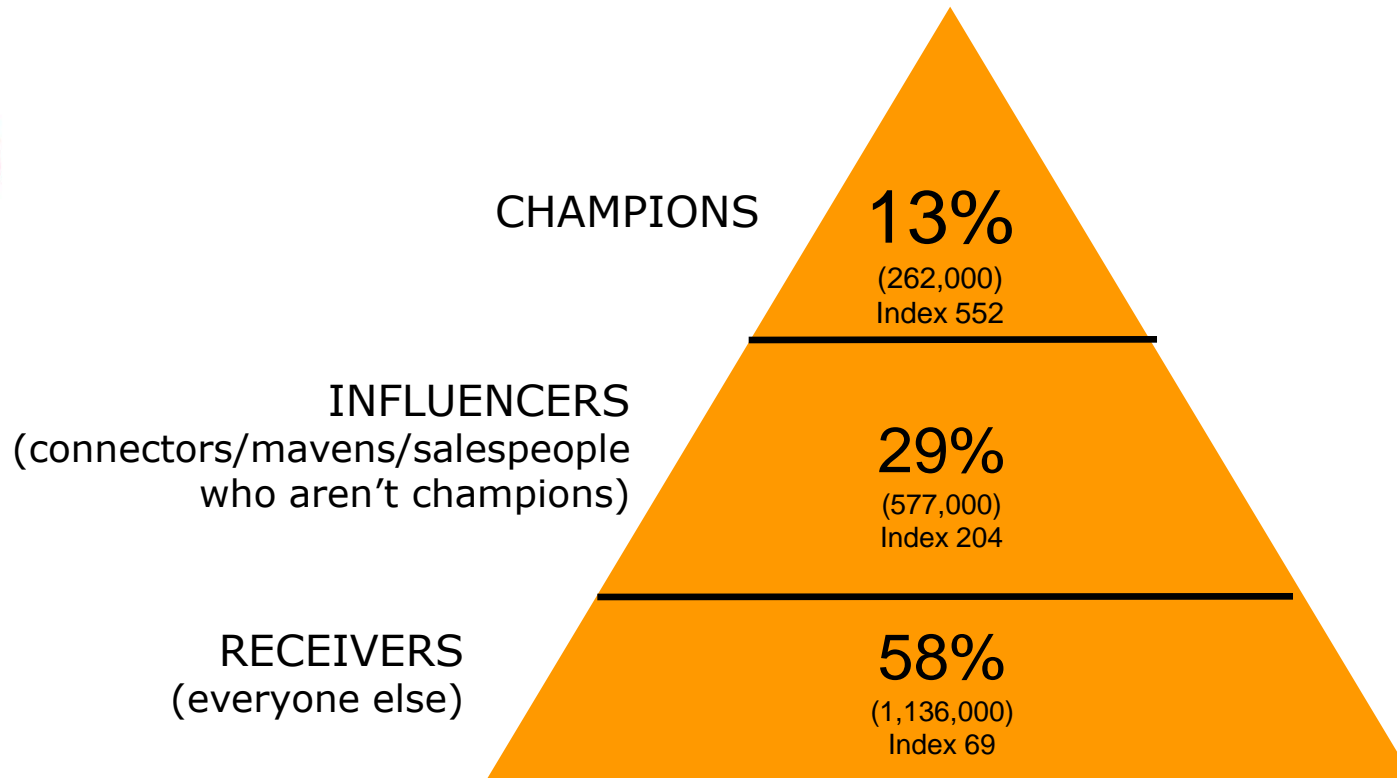
Posted comments / reviews online AND a lot of knowledge

Sector	Print title (AIR)	Index
Clothes	Vogue	522
Cars	Auto Trader	672
TV / audio / visual	What Hi-Fi? Sound & Vision	1417
Holidays & travel	National Geographic	228

QUANTIFY ONLINE AMPLIFICATION

1. How can we **quantify the effect** of online comments and reviews?
2. The **WOM** offline audience **is limited** by the number of people with whom one can communicate
3. The **WOM online** audience of an individual is likely to be **much larger**
4. The average **Facebook** user has **130** friends!
5. If they post a comment or review on their wall, **most (if not all) of their friends will see it...**

AMPLIFYING MOTORING



BBC Top Gear
AIR 1,975,000

Base: All Internet users

Source: GB TGI Net 2010 Q1

GROSS AMPLIFICATION POINTS

- **Receivers**
 - Members of the target – will be exposed to commercial messages
- **Influencers**
 - Connectors, Mavens and Salespeople (not Champions)
- **Champions**
 - Relay to at least two other people

value: x1

value: x2

value: x3

THE AMPLIFICATION FACTOR - MOTORING

	Champions	Influencers	Receivers	Total
BBC Top Gear (AIR 1,975,000)	262,000	577,000	1,136,000	1,975,000
Assumed Amplification Factor	X3	X2	X1	
Amplified Contacts (000s)	786,000	1,154,000	1,136,000	3,076,000
Amplification Factor				1.56

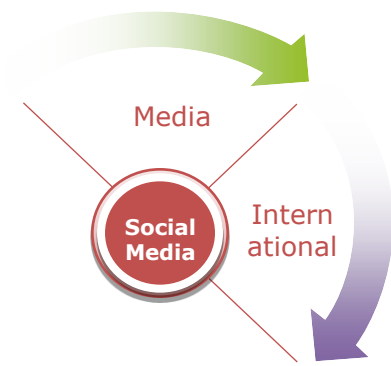
GROSS AMPLIFICATION POINTS

- **Receivers**
 - Members of the target – will be exposed to commercial messages **value: x1**
- **Influencers**
 - Connectors, Mavens and Salespeople (not Champions) **value: x2**
- **Champions**
 - Relay to at least two other people **value: x3**
- **Posted comments / reviews online**
 - Linked to an average 130 people (?) **value: x130**

GROSS AMPLIFICATION POINTS

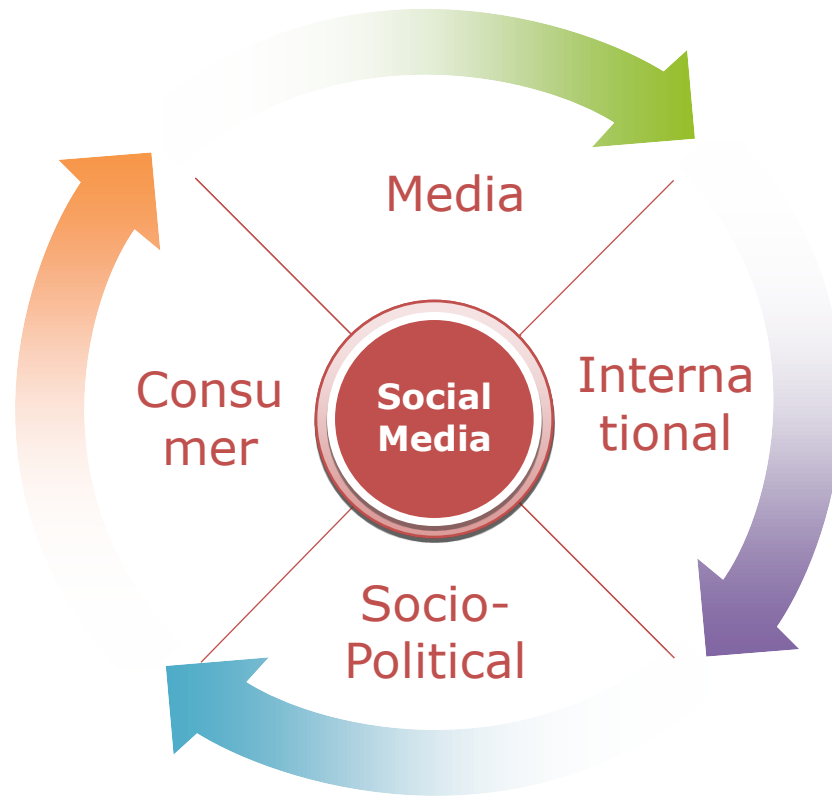
	Champions	Influencers	Receivers	Total	Online reviewers / commentators
BBC Top Gear (AIR 1,975,000)	262,000	577,000	1,136,000	1,975,000	234,000
Assumed Amplification Factor	X3	X2	X1		X130
Amplified Contacts (000s)	786,000	1,154,000	1,136,000	3,076,000	30,420,000
Amplification Factor				1.56	130

CONCLUSION 1

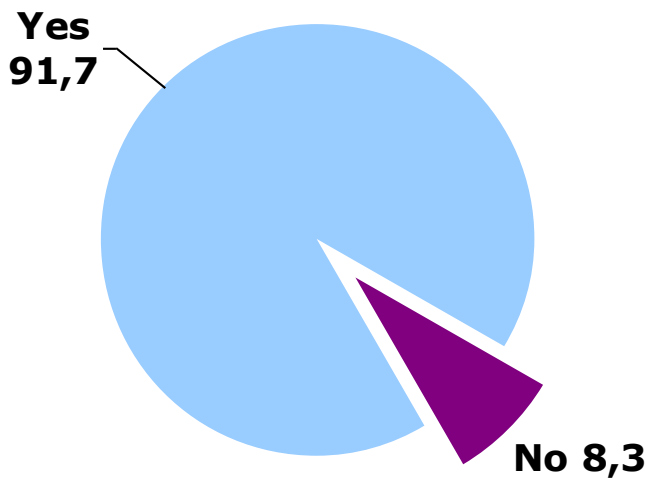


1. Due to the recession and structural changes in the media industry, many core **media organizations and brands are having a difficult time.**
2. The very concept of **earned media could be viewed as threatening** as it implies that **media don't need to be paid for.**
3. However, the relationship between **UGC and Offline** media can be highly **synergistic**
4. UGC **offers amplification** potential for **professional content providers**

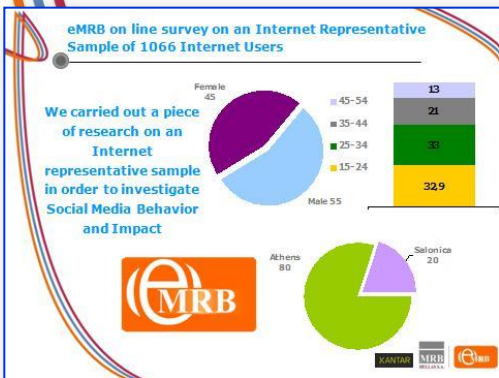
360° Impact of Social Media



Account in Social Media (Facebook, MySpace, YouTube, LinkedIn, etc)



Social Media are Dominated by Young People



N= 1066

Do you have any account in Social Media (e.g. Facebook, Myspace, YouTube, LinkedIn, Hi5, WordPress, Flickr or any blog)?

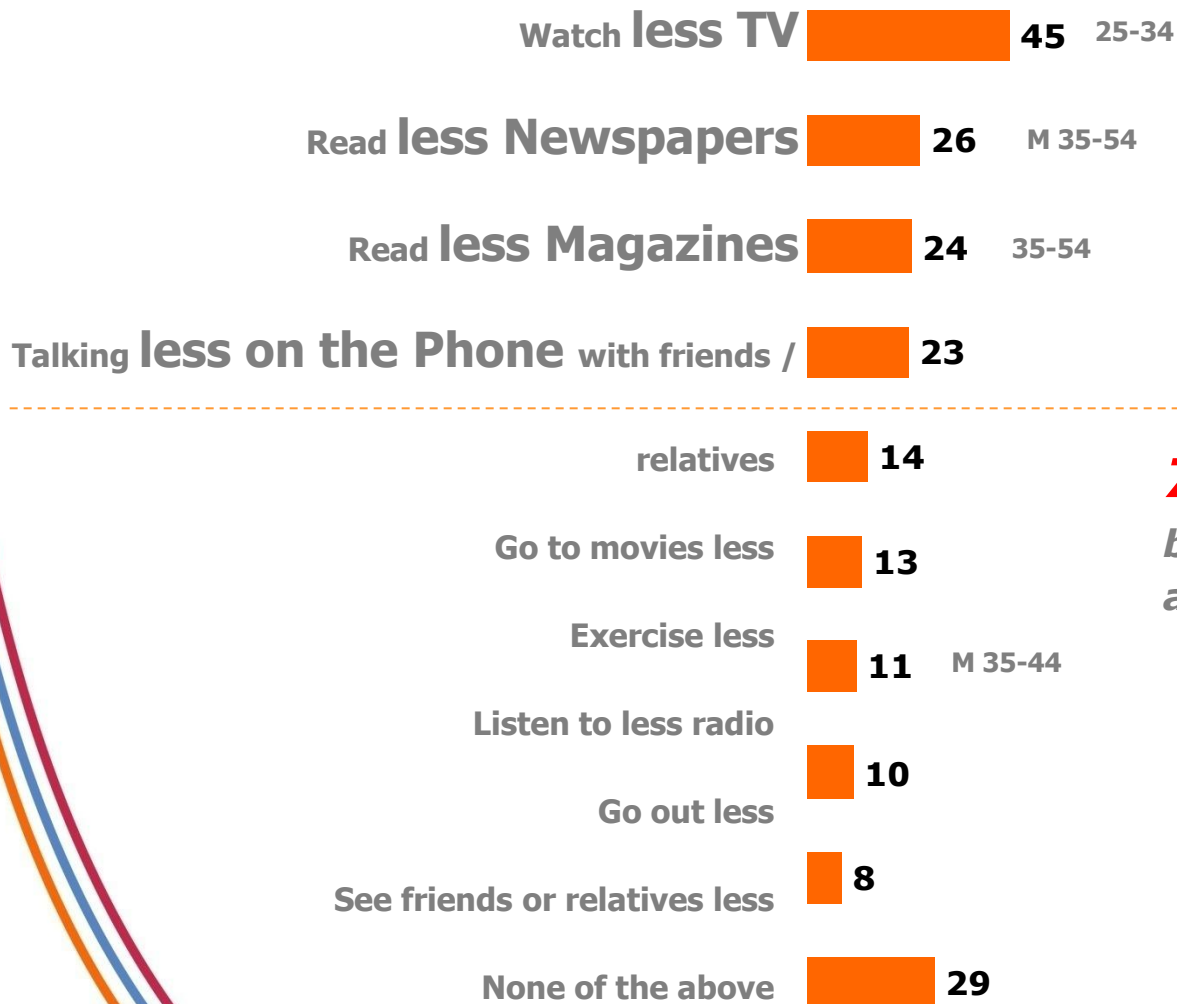


Huge FRAGMENTATION

There is something for everybody



Habits replaced through Social Media



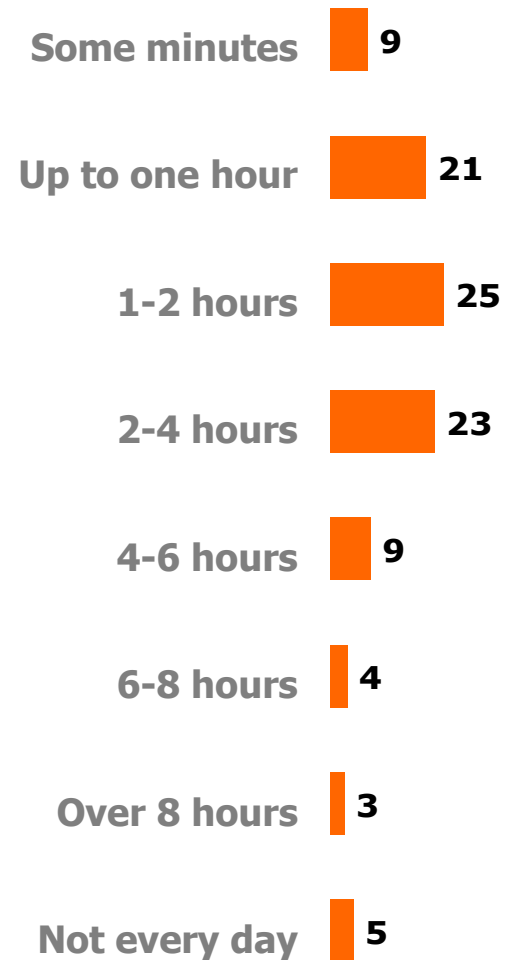
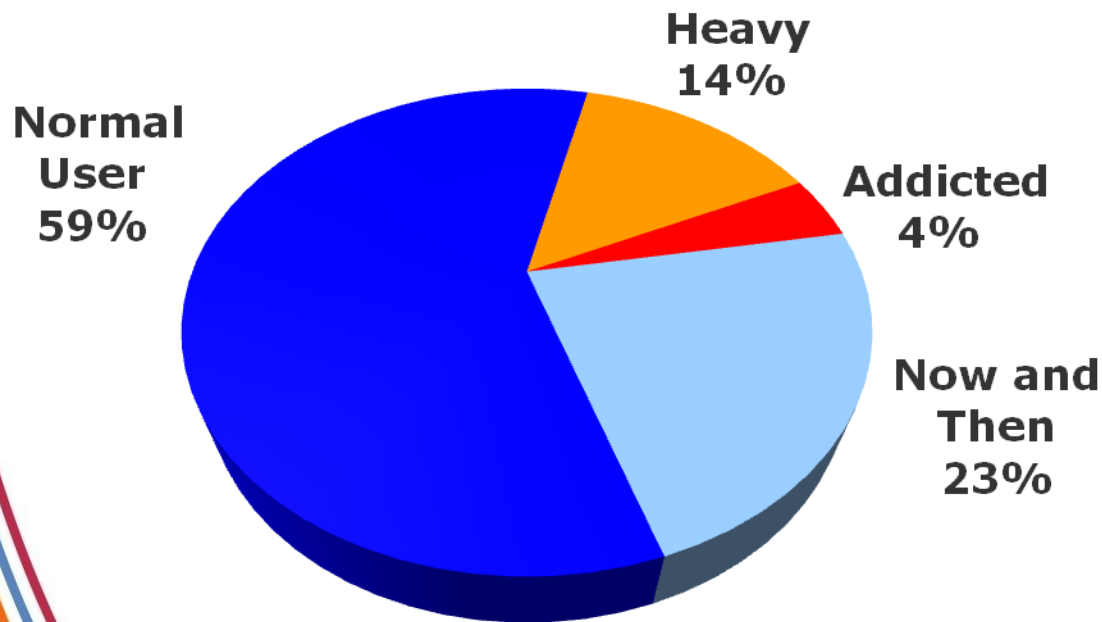
71% have changed their behavior since they became active within Social Media

Has any of the following happened to you since you became active in Social Media as a reason of becoming Active?

Typologies in relation to Social Media Usage

M.S. 2,5 Hours / Day

Current Behavior



How would you describe yourself in relation to social media?



WHY?

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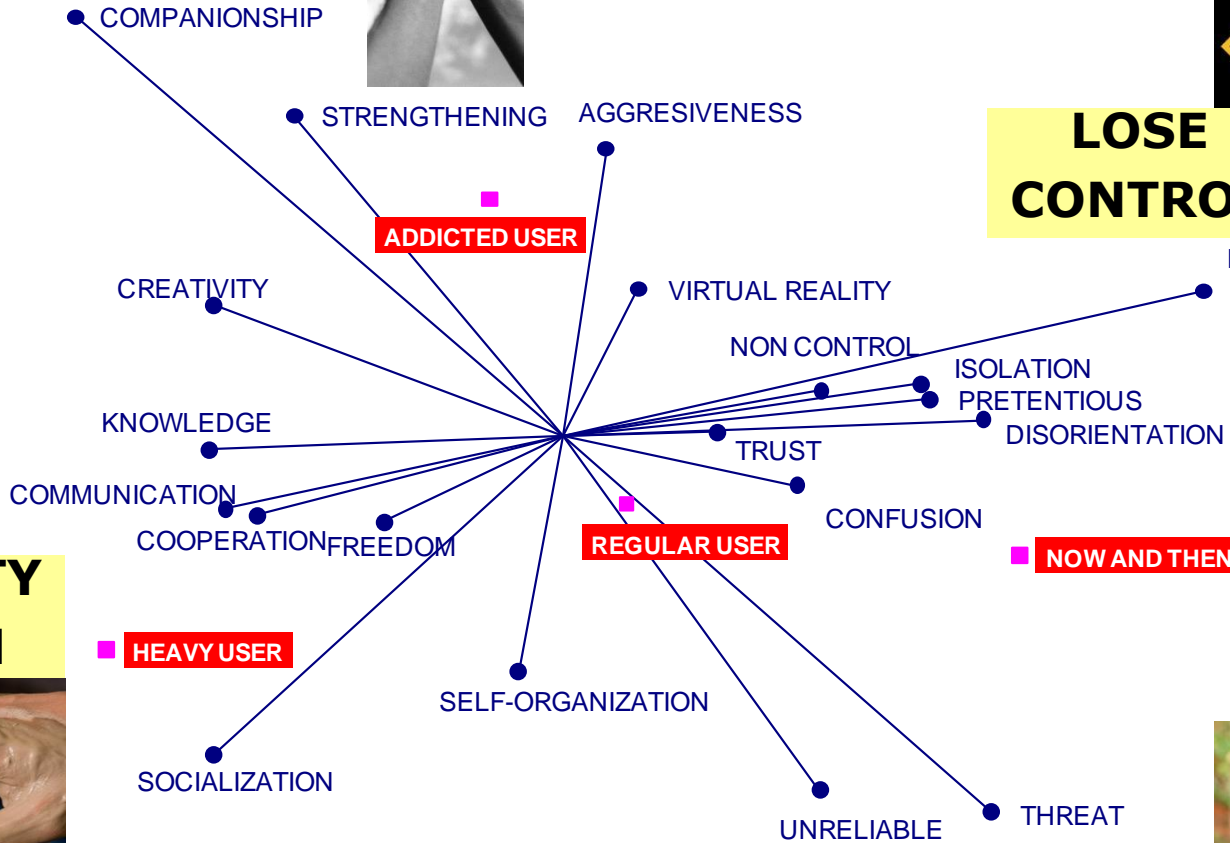
WHY?

WHY?

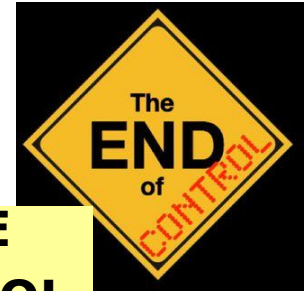
WHY?

Social Networking Addiction index

EMPOWERMENT



LOSE CONTROL



CREATIVITY FREEDOM



THREAT



You connect FURTHER and DEEPER



For which of the following reasons would you say that you are part of social media?

Social Media is regarded BENEFICIAL



Do you think that since you became active in the social media you had any of the following effects in your life?

EMOTIONS Expressed on Social Media

73%



50%
Anger



49%
Sadness



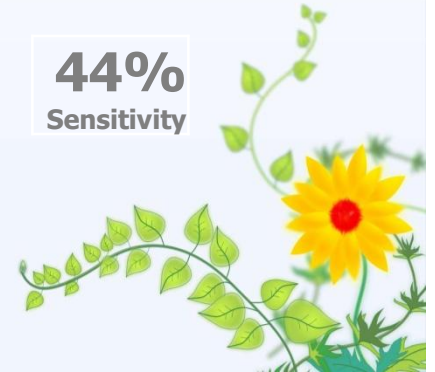
45%



44%
Wondering



44%
Sensitivity



33%

Impatience

20%
Despair



Have you ever expressed any of the below feelings in any of Social Networking?

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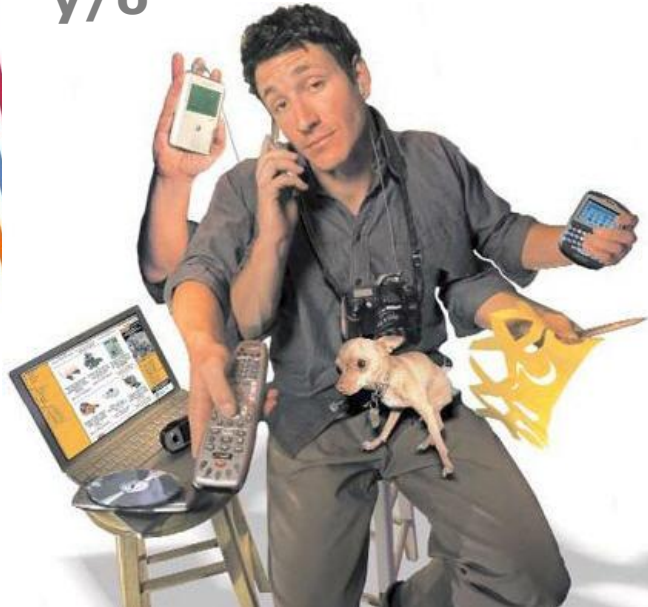
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MULTITASKING - At the same time

Multitasking is the norm.

64% are active in Social Media and at the same time in other Internet sources. This is intense with Men and Young Adults up to 34 y/o



Young People are juggling through all Media simultaneously

45%



39%



25%



33%



Which of the following best applies to you? Would you say that when you are active in social media...



Tasks while in Social Media – FUN



78%
comment on
photos of
friends and
relatives,
especially
Females and YA



70% upload
Music or Videos,
especially
Females and YA



62% have
played a game,
especially
Females and YA

67%
comment on
Music or Videos,
especially
Females and YA



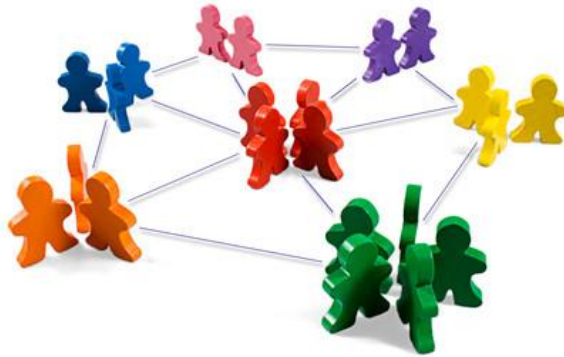
33% have
flirted or have
found a
relationship

Have you ever done any of the following?

Tasks while in Social Media – Health and Work

Beneficial

15% have been approached professionally, especially Males



21% comment on Health Issues, especially Females and MA



Have you ever done any of the following?

Tasks while in Social Media – Society and Products

57% comment on Greek News, Greek Politics and Society, especially Males and MA



45% Comment on Product and Services, especially Females and MA

36% comment on Athletic Events, especially Males

28% comment on issues related to work, especially Males



27% comment on International News, especially Males and MA

Have you ever done any of the following?



Making your Life Public through Social Media is Attractive

Photos or videos ...

... of yourself  **69** F 15-34

... holidays  **68** F 15-34

... from parties or celebration  **47** F 15-34

... of your beloved  **27** F 15-34

... of your family  **25** F 25-34 45-54

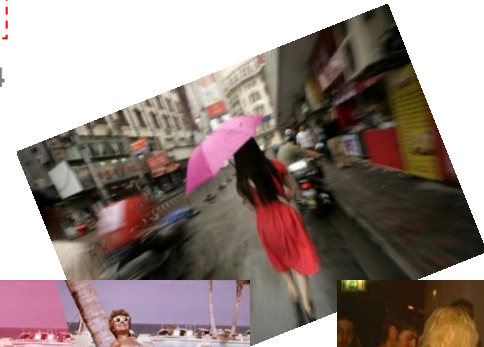
Content related to work  **21** M 35-44

... of a nice meal/ food  **18** F 15-24 25-34

... of marriage or baptism  **17** F 25-34

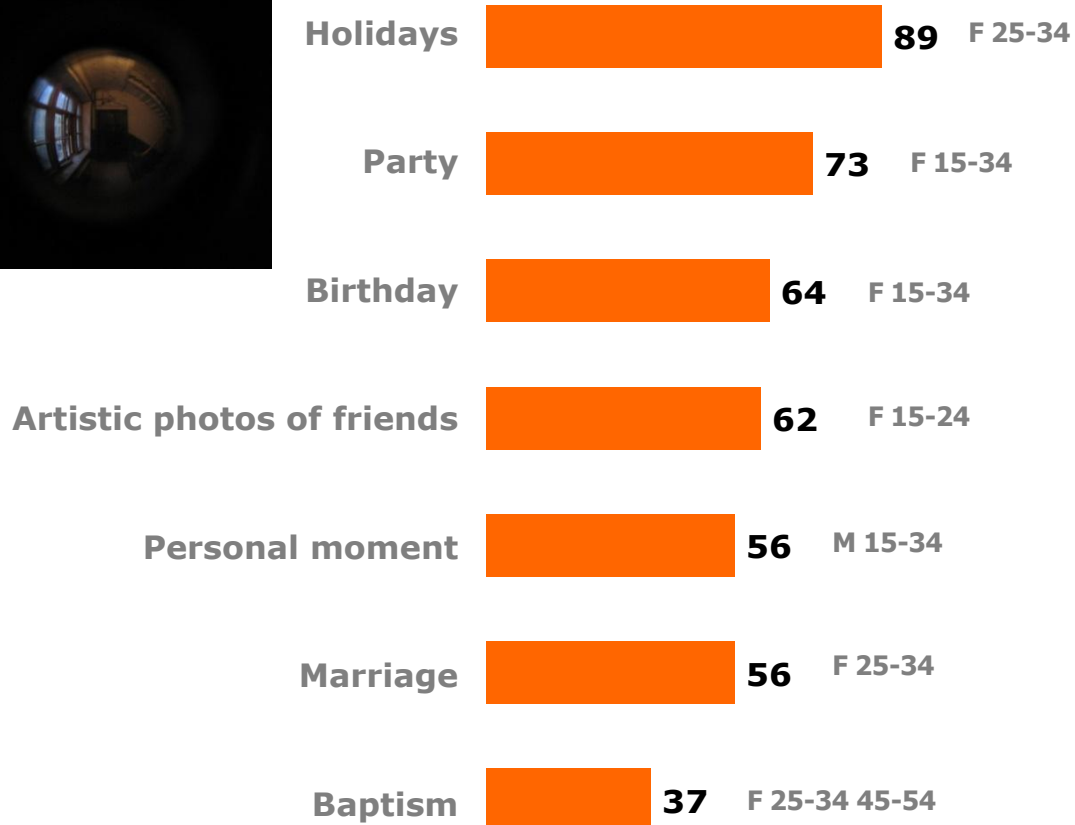
... from a new purchase  **14**

... of your baby/ kids  **12** F 35-54



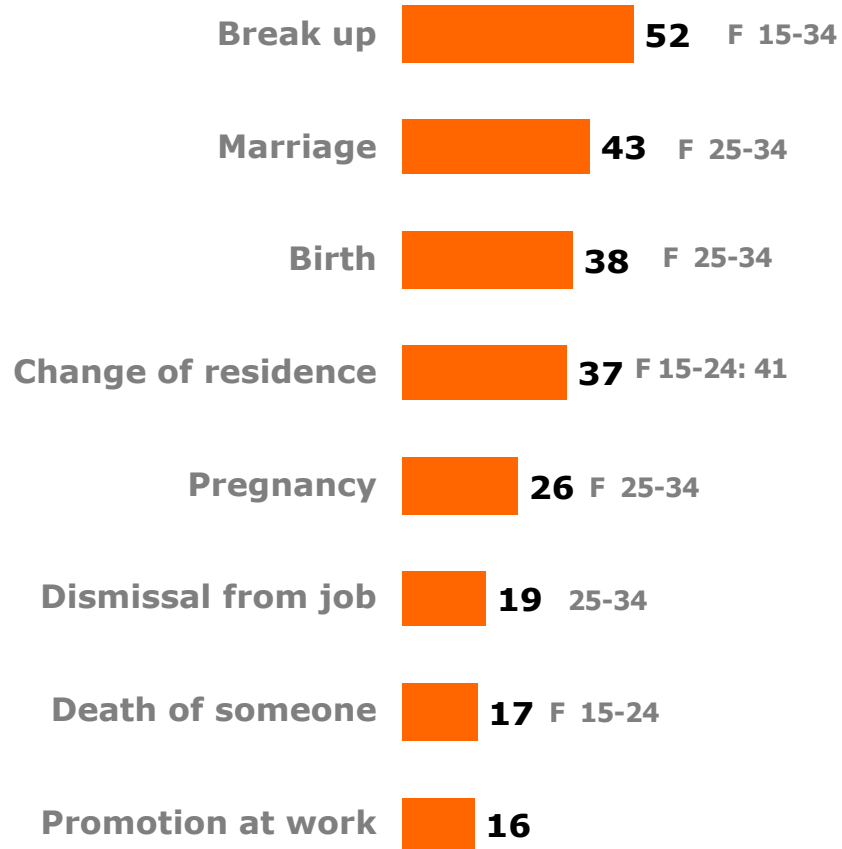
Have you ever uploaded any of the following?

Looking through the Peep Hole is soooo easy...



Have you looked into Photos of friends or acquaintances from any of the following occasions?

The On Line Grapevine is rich in information



Have you found out through Social Media any of the following, that you did not know about your circle of friends and acquaintances?

Social Media makes Media more Interactive and increases Audience Involvement – Political Content

Looked for further content in Social Media



75

Made comments on social media about what was being said



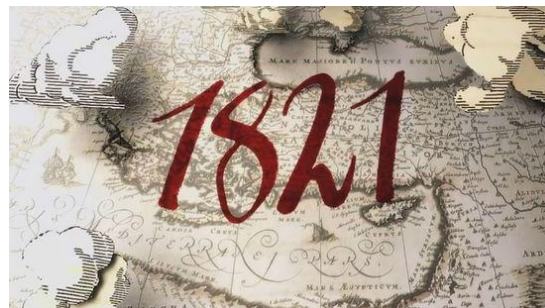
53

Promoted/ uploaded on Social Media part of what was being watched



38

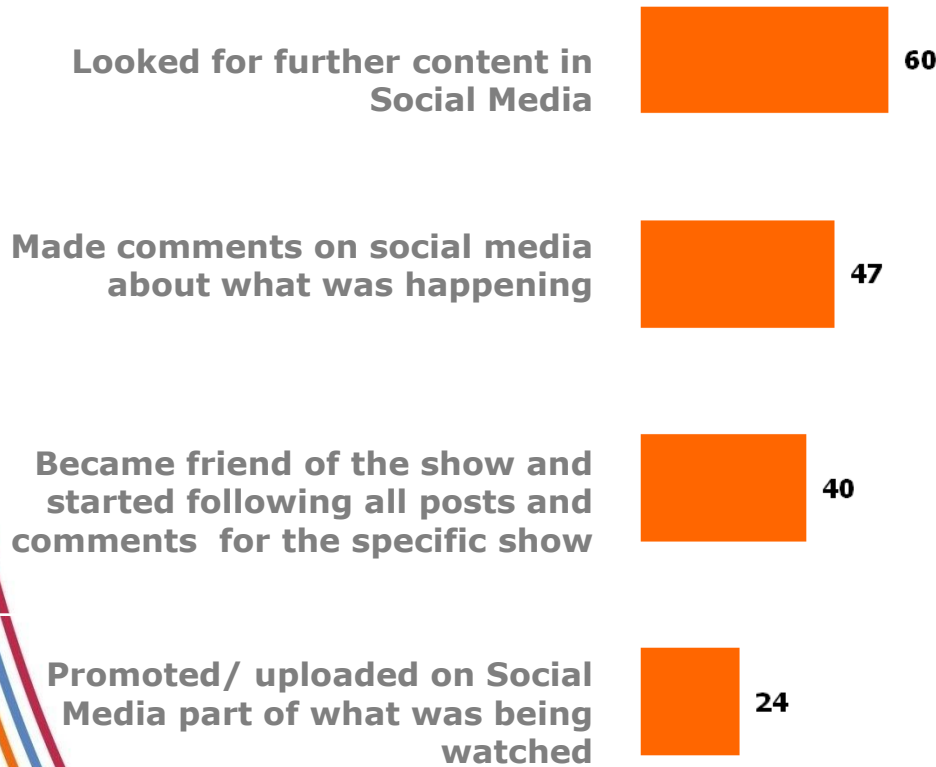
*While watching TV, the News, Shows/Discussions of Political or Social content the Social Media audience **(74%)** tends to interact by simultaneously looking for further information and posting comments. More Males tend to do it.*



Have you ever done any of the following while watching the news on TV or watching political shows or current affairs shows ?



Social Media Makes Media more Interactive and increases Audience Involvement – Entertainment Content



While watching Popular Entertaining Shows, the Audience (45%), especially Women, tends to Interact within the Social Media. This way increasing the effect of the shows, by creating content outside the medium (TV)



Have you ever done any of the following while watching any entertaining show like 'To Nisi' or Reality show like Top Chef, Master Chef, Top Model, Big Brother, etc?

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***We realized how Impactful Social Media are,
during the events in Cairo***



***"We use Facebook to
schedule the protests"***



***"We use Twitter to
coordinate"***



"We use You Tube to tell the world"

Breaking News – The Revolution in Egypt

On the News TV, Radio,
Newspaper



75

Through Social Media like
Facebook, Twitter, blogs,
etc



11

Someone told me



7

Other



7

TV News are still the first medium to receive breaking news. However, Social Media are taking the place of other smaller traditional media



The following questions are related to the current affairs that concern the Media, like the events in Egypt, Libya, etc
How did you hear first about the riots in Egypt?

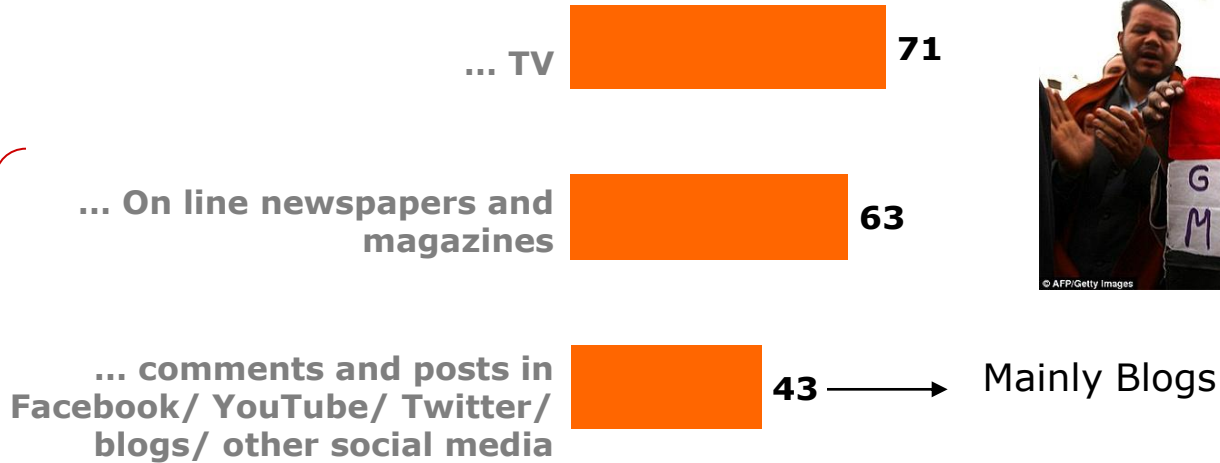
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How did you keep up with the news in Egypt

73%



The Information Landscape is changing. On Line Newspapers and Magazines are so close to TV!!! Also, half of the audience counts the Social Media as an official source of information with Blogs playing the most significant role

From which media did you continue to get informed about the revolt in Egypt?

Comments on the Memorandum of Greece and the Crisis

Made a comment on others' comment  70

Posted my own comment  45

Comments on article  45

Posted an article  28

Comments on Video  26

Posted a video  5

53% of People (especially Men) who are active in Social Media have made some kind of comment regarding "Μνημόνιο" within Social Media. When it comes to our neighborhood and it is about things that are very close to us we are super active

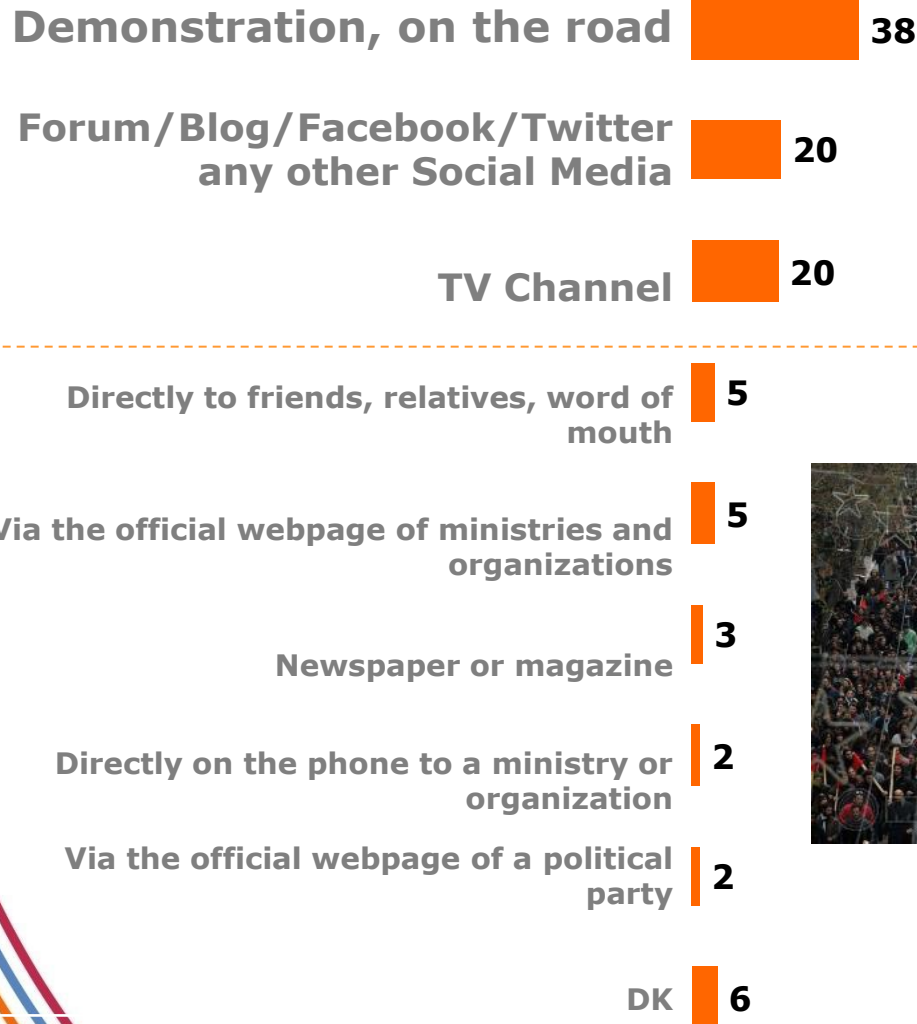
Οι δέκα εντολές της τρόικας

- 1 **ΑΠΕΛΕΥΘΕΡΩΣΤΕ** την αγορά ενέργειας - πουλήστε μονάδες της ΔΕΗ 
- 2 **ΑΝΟΙΞΤΕ** εδώ και τώρα τα κλειστά επαγγέλματα
- 3 **ΚΛΕΙΣΤΕ** τις μαύρες τρύπες σε νοσοκομεία, ΟΤΑ, ασφαλιστικά ταμεία
- 4 **ΒΡΕΙΤΕ** γιατρούς για τη γάγγραινα των ΔΕΚΟ
- 5 **ΑΥΞΗΣΤΕ** τα δημόσια έσοδα με πάταξη της φοροδιαφυγής 
- 6 **ΚΑΝΤΕ** αναλογιστική μελέτη για τα ασφαλιστικά ταμεία
- 7 **ΠΑΡΤΕ** μέτρα για τη μείωση του πληθωρισμού 
- 8 **ΕΠΙΤΑΧΥΝΕΤΕ** την απορρόφηση κονδυλίων του ΕΣΠΑ 
- 9 **ΣΥΝΕΧΙΣΤΕ** να παρακολουθείτε στενά τις τράπεζες
- 10 **ΣΥΝΤΟΝΙΣΤΕΙΤΕ** καλύτερα στην εφαρμογή του Μνημονίου



Have you commented in some way the Memorandum of Greece or the general crisis Greece is facing in any social media?

Impactful way to complaint about Political, Financial & other Social issues



Complaining through the Social Media about Political and Social Issues is considered as impactful as complaining in TV channels, which traditional was THE way to put pressure



Which way do you think would have the greatest impact for someone to complain about political, financial or any other social issues

The Consumer and the Products

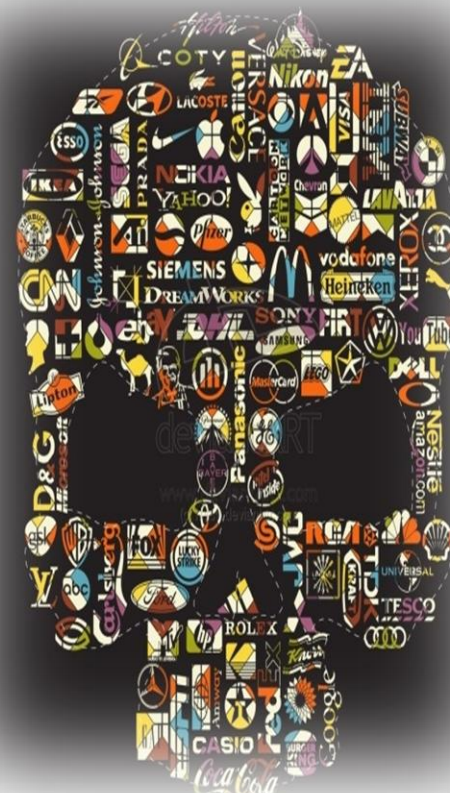
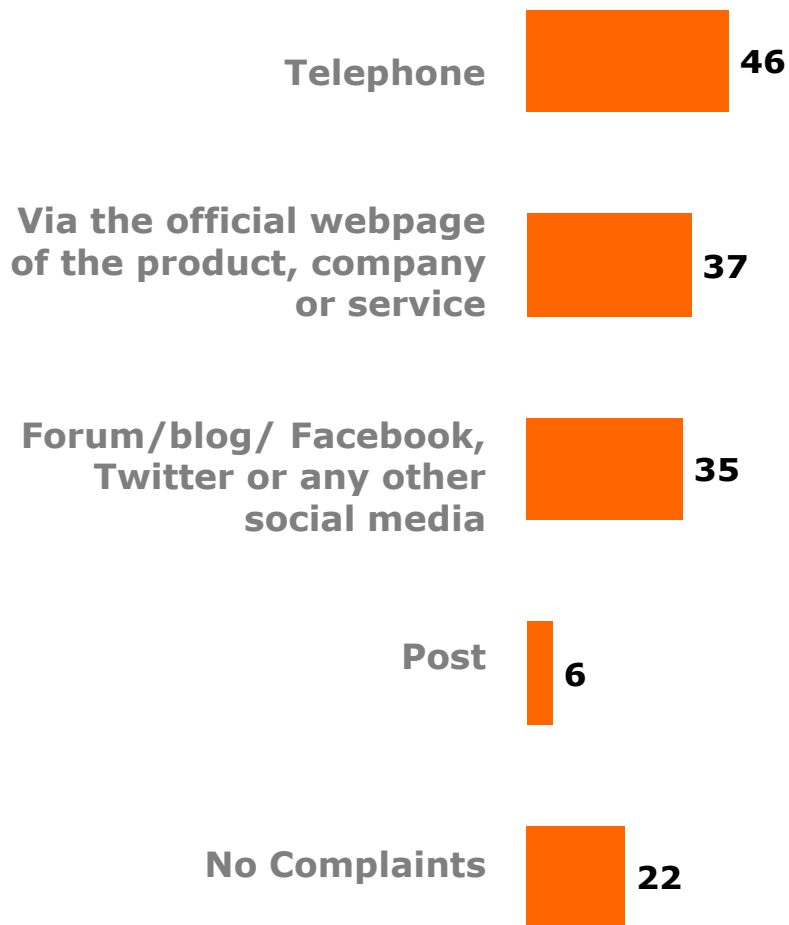
45% Makes Comments on Products and Services

25% Shops less from Shops and more on line

14% Uploads material related to products and services



Ways of complaining about a Product or Service



Have you ever complained about a product or service that you weren't satisfied with any of the following ways?

Most effective way to complaint about Products, Companies & Services



Complaining through the Social Media is regarded the most impactful way to complaint about Products Companies and Services

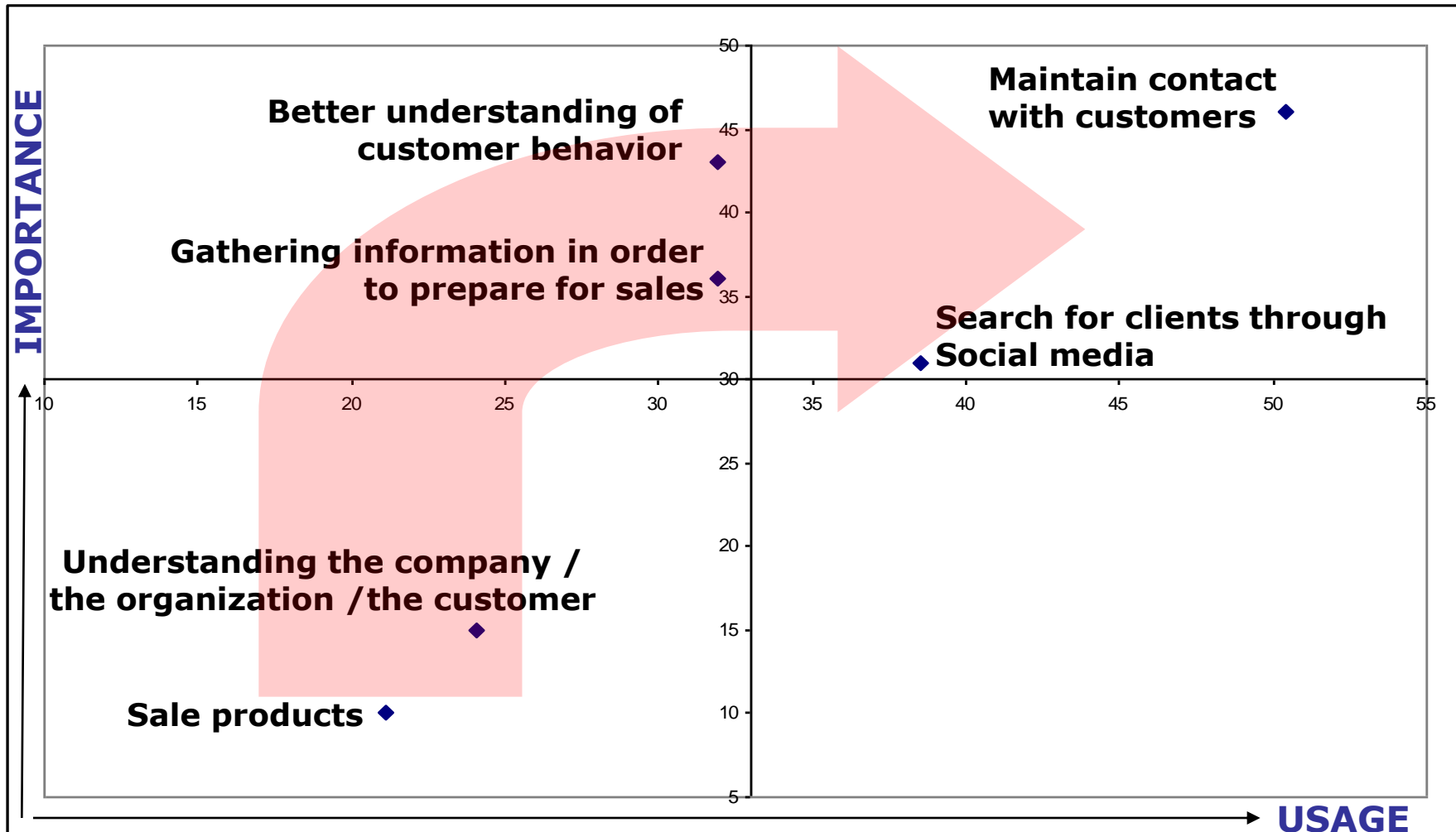


Which way do you think is the most effective, having the greatest impact, in order to complain someone for products/ companies or services?

SOCIAL MEDIA BUSINESSES

• Usage vs Importance / priorities of Social Media ...

on **Sales**



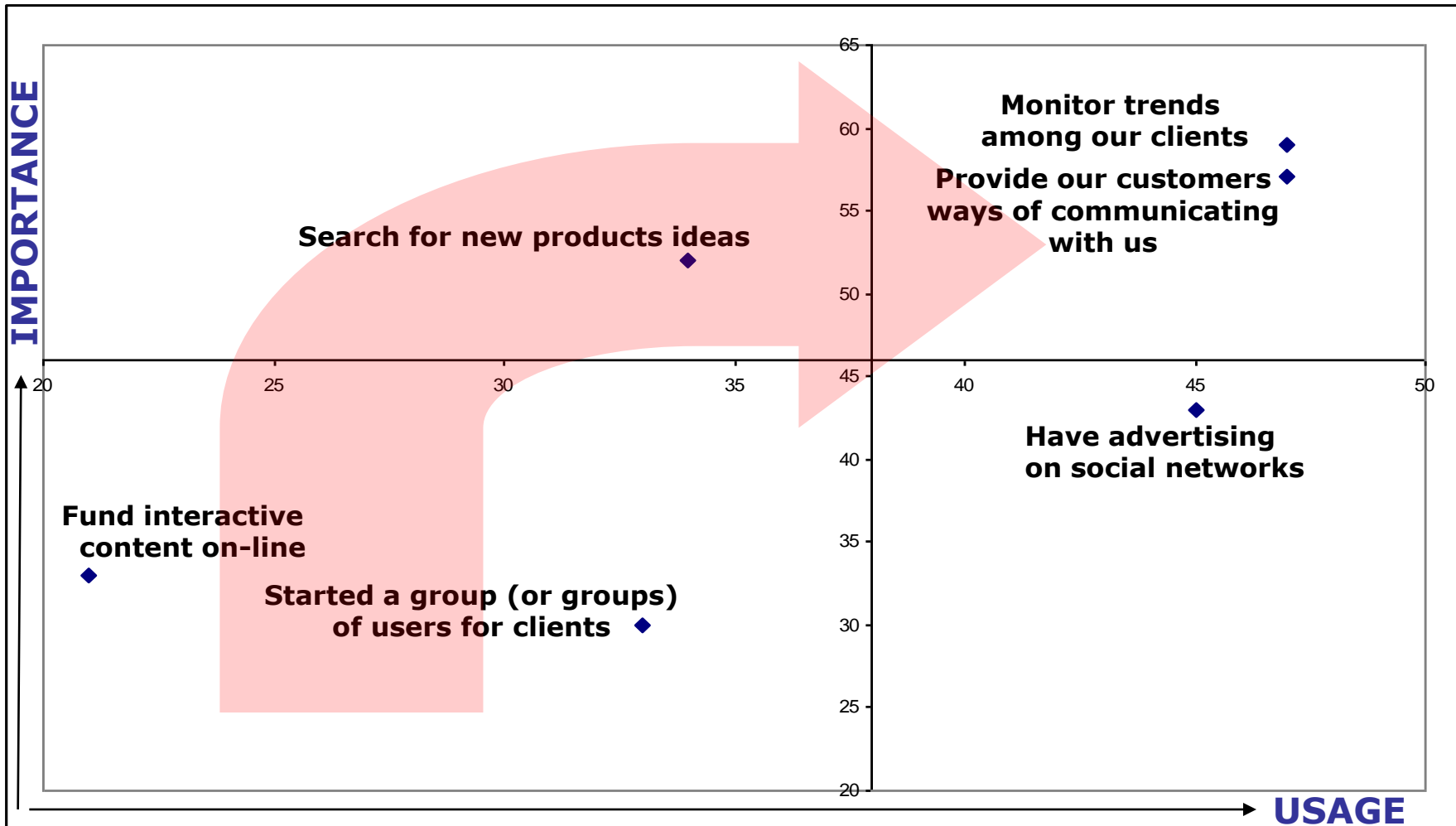
Base: Total Executives, N=270

4. Please note all the ways that your company use social networks - Social Media in the area of sales.

4a. Please select all the actions related to sales that you personally believe your company should give priority concerning the use of Social Media.

• Usage vs Importance / priorities of Social Media ...

in Marketing



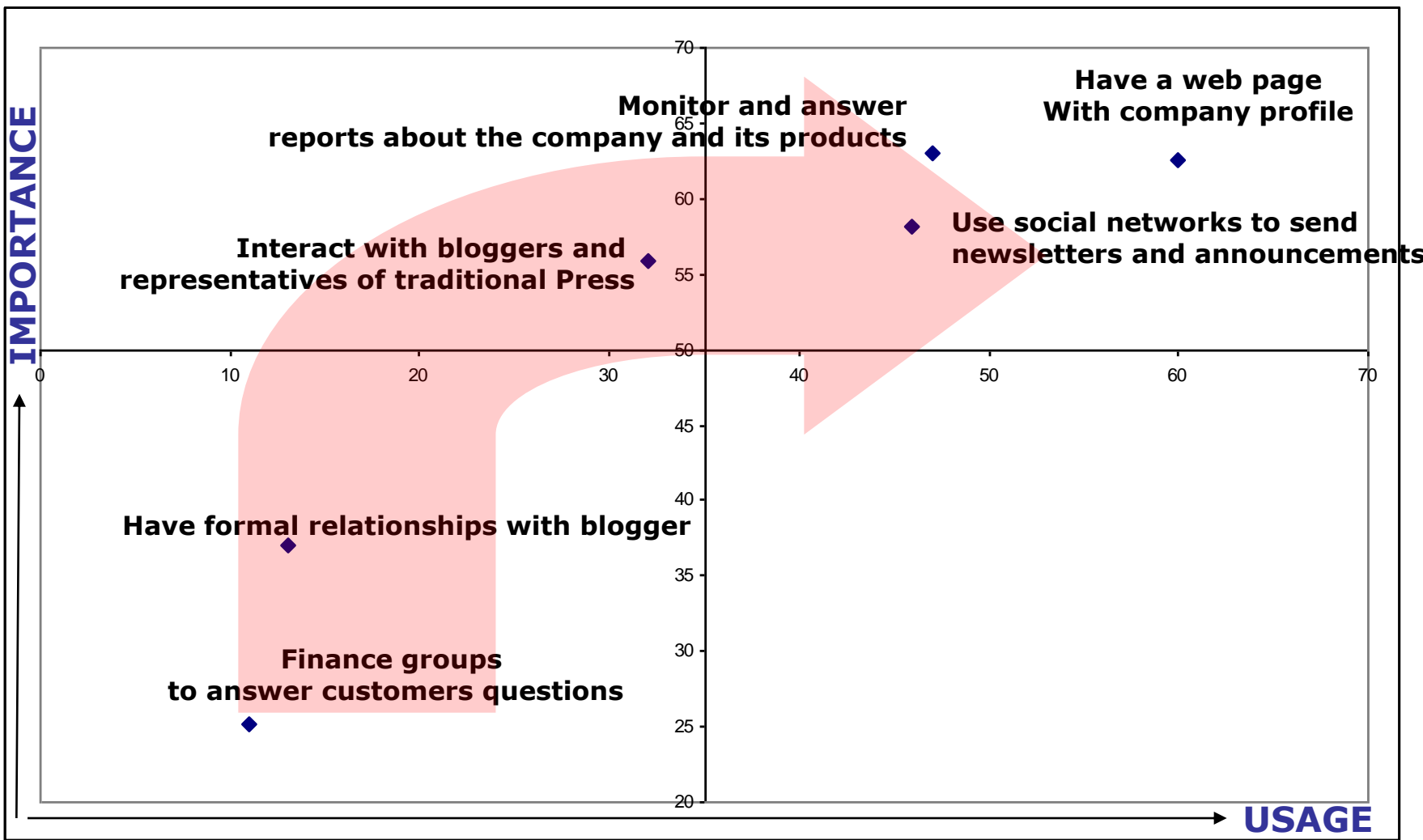
Base: Total Executives, N=270

5. Please select all the actions of marketing that your company currently use Social Media.

5A. Please select all the actions of marketing that you personally believe your company should give priority concerning the use of social Media.

• Usage vs Importance / priorities of Social Media ...

in Public Relations

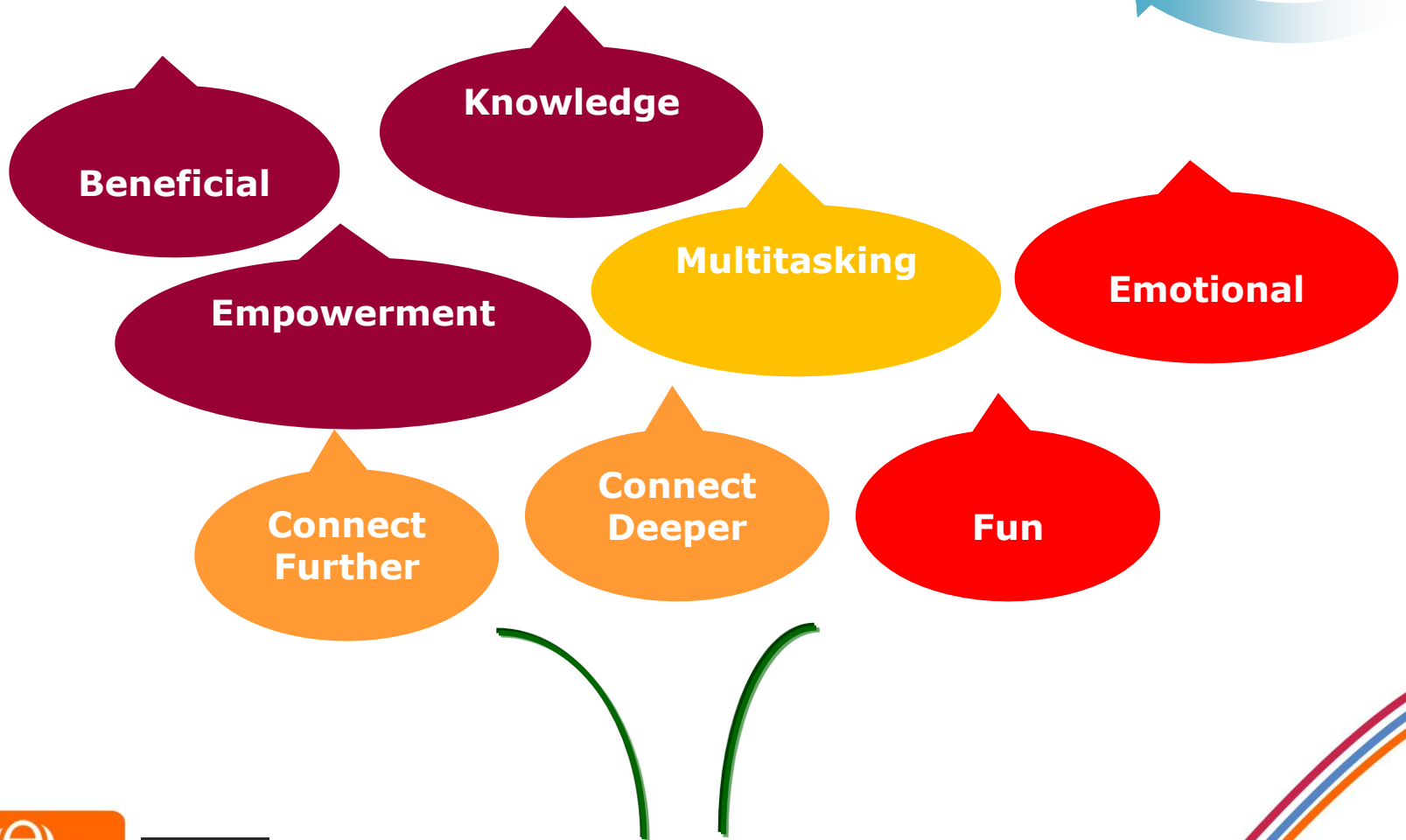
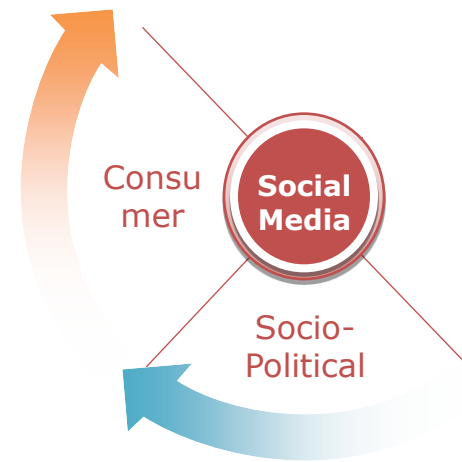


Base: Total Executives, N=270

6. Please select all the actions of public relations used by your company that are provided by social networks.
 6a. Please select all the actions of public relations that you personally believe your company should give priority concerning the use of Social Media.

CONCLUSION 2

Social Media is ...

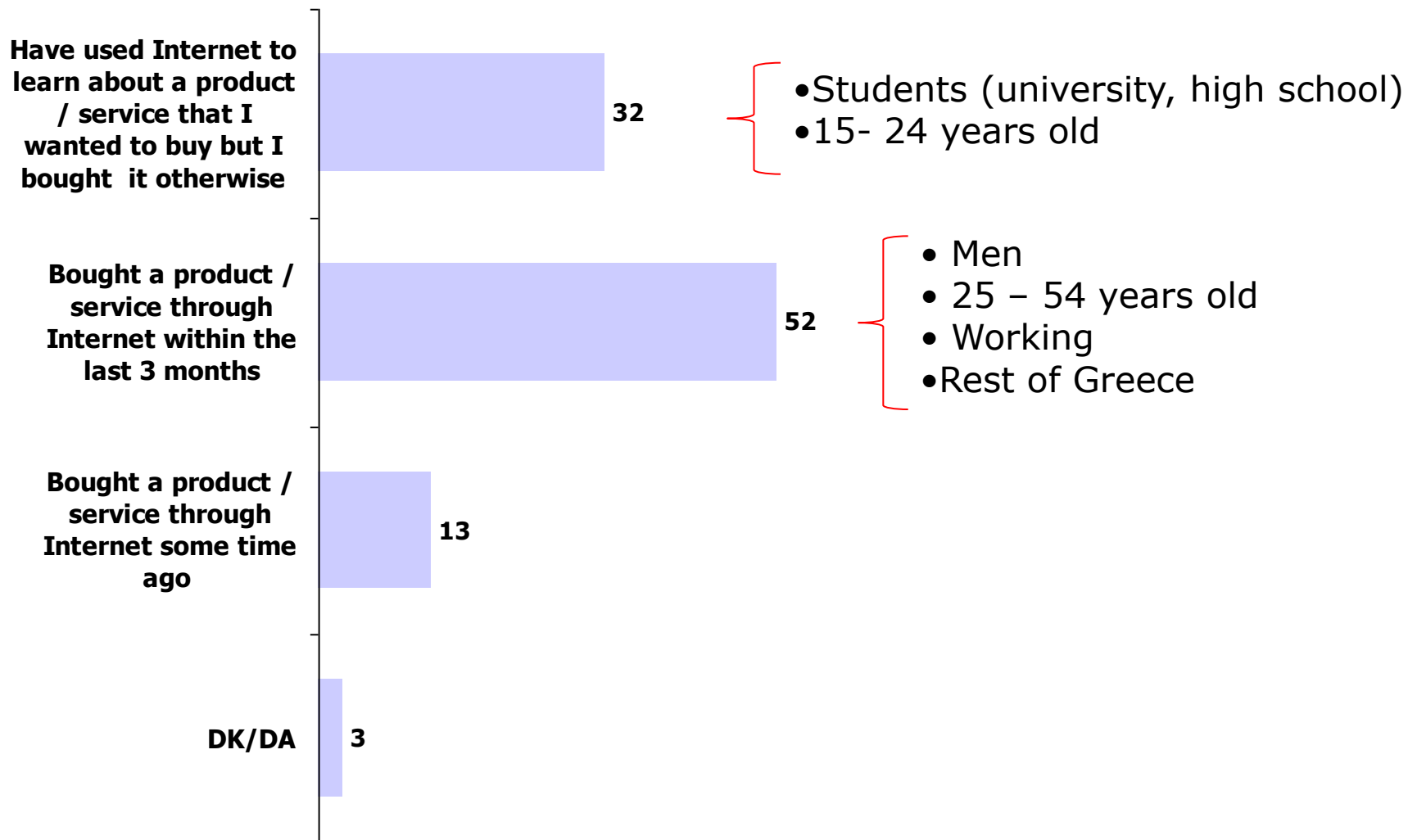


On Line Paid Media



adict

• «Buy through Internet?»



Base: Total Internet users, N=1022

ALL: QUE. 20 Which of the following related to product buying / services have you done through Internet?

The *adict* Initiative

addressing the needs of the
Internet market

adict

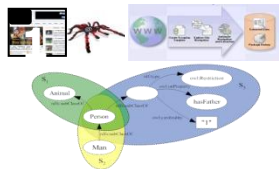
The *adict* Initiative Internet & Market needs

- Brands need efficient and focused banner campaign



- The Solution is a **holistic** approach that is supported by a robust synergy of diverse services
 - Management Consulting
 - High Technology Intelligence
 - Market Research Based Insights

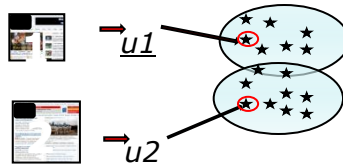
Digital Media Plan Configuration



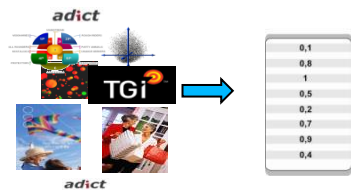
Step 1: Semantic analysis



Step 2: Modeling & analysis



Step 3: Clustering



Step 4: Product modeling (fusion)



Step 5: Optimized media planning

