Social Media Trends 2018

Hootsuite's annual report on
the latest global trends in social media

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Contents

Executive summary

As we look forward to 2018, it's clear that the dominance of social networking will continue to increase. Across all global markets, consumers are spending more time on social networks every year. While connecting with friends remains the top motivation for using social networks, digital consumers are also engaging in new activities like tuning in for live broadcasts, researching products, interacting with Messenger bots, and watching an ever-increasing number of mobile videos.

As consumers adopt new social behaviors, organizations are also maturing their publishing, advertising, and measurement strategies. In 2017, we saw a long list of innovative social advertising formats, the victory of mobile video, and the rise of AI messaging bots. Organizations are interested in these innovations. But they're also under pressure to justify the ROI of existing social media investments.

In Hootsuite's third annual Social Trends Report, we evaluate key global trends, offer recommendations to help solve common challenges, and identify practical ways your organization can better deploy social across all points in the consumer purchase funnel. Our goal is to provide you with new data, best practices, and inspiring case studies to guide your 2018 social media investments.

Methodology

Hootsuite's Social Trends Report evaluates global audience behaviors and social strategies.

This report is based on a survey of 308 social marketing practitioners; qualitative interviews with 38 industry specialists; global data on the evolution of social ROI from Altimeter and Hootsuite; and analyst reports from Edelman, Gartner, GlobalWebIndex, L2, Forrester, Econsultancy, Kleiner Perkins, Deloitte, and McKinsey & Company.

Every year, social media offers marketers a long list of new technologies and experimental tactics. However, we weight our analysis towards trends that can be implemented by our customers in the coming year.

Key Questions

- How will major social networks develop in 2018 and what do these product investments mean for Hootsuite's customers?

- What are the five most significant social trends that will produce tangible business results in 2018?

- Which brands are deploying innovative uses of new technology?

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Hootsuite's 2018 social trends at a glance

1. The evolution of social ROI

For years, we've been predicting the death of short-sighted vanity metrics. In 2018, we're seeing this long-promised shift finally take place.

What's different? While organizations have traditionally used social media to increase top-of-funnel engagement, many are exploring and discovering the value of social in other phases of the customer journey. In addition to brand awareness, social media is also helping organizations achieve business objectives such as lowering customer service costs, tracking changes in brand perception, mitigating risk, attracting top talent, and even feeding social insights into supply chain analyses.

But this evolution requires new metrics—and alignment of social media strategies with your organization's most urgent business challenges.

2. Mobile fuels the growth of social TV

Mobile usage, shorter attention spans, and the thrill of novelty have accelerated the consumption of video content. The old buzz phrase used to be that "brands need to be publishers." But in 2018, social networks will encourage brands to become broadcasters as mobile video and social-TV style programming take the spotlight.

Creating broadcast-style content won't work for every brand or product category. And the metrics that bump the stock price of social networks—such as engagement rates or video views—might not help your organization achieve your specific business outcomes. However, for many industries, this will open up innovative social advertising formats and bold new ways to engage social audiences.

56% of respondents said that **not being able to prove the ROI of social media made it difficult** for their organization to be successful with social media.

Hootsuite 2018 Social Trends Survey

3. Trust declines, while peer influence rises

2017 was a tumultuous ride—we saw the explosion of fake news in public discourse, U.S. President Donald Trump's unexpected triumph over traditional media, and an erosion of public trust in mainstream institutions.

Politics aside, these cultural and technological shifts impacted both businesses and consumers. As Edelman found in their global study of consumer confidence, for the first time in history consumers trust peers just as much as technical experts and more than CEOs, governments, and academics.[1] Marketing leaders are also more skeptical of inflated influencer metrics and wary of paying to reach social media bots instead of humans.

33% of respondents said that **not being able to prove the ROI of influencer marketing** made it difficult for their organization to be successful with social media.

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We're moving away from trusting institutions, vanity metrics, and mega-influencer celebrities—and moving towards smaller and actual spheres of influence where customers advocates, genuine customer communities, and engaged employees matter more than ever.

4. Humans, meet AI

The machines have risen. And marketers have discovered they can be delightfully useful.

The danger, of course, is following this trend, rather than understanding the far-reaching changes AI will bring to social marketing. Over 100 million Messenger bots are now active on Facebook (a 233 percent YOY growth over last year's 33 thousand). But it's still unclear whether customers will value these human-less engagements.

While AI is still a future-facing trend, marketers can expect to start reaping the practical benefits in 2018. Facebook, for example, has released new predictive analytics to help marketers find insights faster. And visual search engines are using machine learning to help consumers search by images rather than keywords, a shift that will redefine the future of online product browsing.

5. The promise (and reality) of social data

Organizations have long heard about the benefits of deep listening and uncovering customer insights with social data. But they've also realized that integrating social data with other analytics systems—or finding usable insights from mountains of social mentions—requires a lot of work and more resources than they originally thought. In 2018, the promise of social data remains—but organizations will need to recalculate the effort and resources they'll need to invest to turn social data into a true source of customer insights that can be used across the enterprise.

3 challenges ahead in 2018

Looking ahead to 2018, we see three core challenges facing marketers.

Challenge #1

Finding sustainable solutions to declining organic reach.

Analysts warn that organic Facebook reach could shrink further in 2018. Organizations need to accept this new reality, stop chasing short-term tactics, and start building sustainable strategies that are not reliant on organic placement in Facebook's News Feed.

This means being more selective—for example, if your goal is organic engagement, focus on emerging social networks that attract smaller loyal audiences. It also means properly tracking social advertising ROI so that you can secure more budget, and building long-term influencer and advocacy strategies.

BuzzSumo's analysis of 880 million posts in 2016 and 2017 found that due to increased content competition, average engagements on Facebook content are falling. That said, video continues to be the best algorithmic boost. As BuzzSumo found, "the average video post in April 2017 reached 12.05% of the total page audience, just ahead of photos at 11.63%, links at 7.81%, and status updates at only 4.56%."[2]

51% of respondents said that **a lack of social ads budget** made it difficult for their organization to be successful with social media.

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Average facebook engagements 2016/17 (all post types)

BuzzSumo analysis of 880m Posts 2016/17
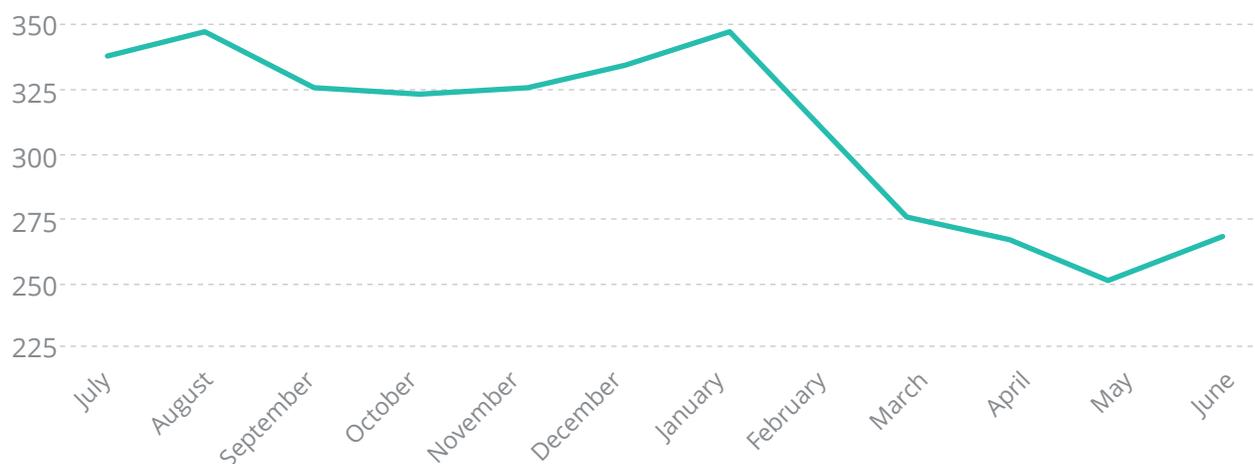
46% of respondents say they're **already implementing social videos**, with another 26% planning to implement in 2018. This means that **social video is quickly moving from being an algorithmic advantage to a table-stakes tactic.**

Hootsuite 2018 Social Trends Survey

Challenge #2
Social video surges ahead— but we're approaching saturation.

If you're not creating social videos or using social video ads, you're already far behind.

Forty-six percent of respondents in our annual customer survey say they're already implementing social videos, with another 26 percent planning to implement in 2018. In 2017, social video advertising spending leaped 130 percent YOY.[3]

Video is a core growth strategy for the major social networks because it's an engaging mobile medium and easy to monetize. But instead of simply feeding social networks more views to monetize, organizations need to connect social video to a broader strategy. Metrics need to reflect business value and ROI, not network-specific metrics based on the features and ad formats suggested by social networks.

> *"People are talking like the future is just going to be video. That is crazy. The future is going to be everything: it is going to be text, photos, audio, and video. The media brands of the future will do these all extremely well."*
>
> Henry Blodget
> CEO and cofounder, Business Insider[4]

40% of respondents said that developing content targeted for specific social networks made it difficult for their organization to be successful with social media.

With every network requiring specific content formats, **brands need to be selective with their resources. If you're struggling to keep up, consider scaling back on experimental tactics. Shift your budget and time back into one or two core platforms.**

Hootsuite 2018 Social Trends Survey

Challenge #3
Brands fatigue from new tools and tactics.

During our research, we heard a common complaint from our customers: They're fatigued with the endless list of new tactics, tools, and content formats.

Social networks continue to innovate and build new ways to reach audiences. But marketers are under pressure to prove that their existing social strategies merit continued investment. Future investments need to have a demonstrable business impact (not just "getting more followers" or "increasing audience reach").

Whether it's adding rigor to attribution models or refining influencer programs, 2018 will be less about experimentation and more about improving the implementation of existing strategies.

How global social media behaviors are changing

- **Almost every internet user can now be reached via social media.** According to GlobalWebIndex's study of 50 thousand internet users aged 16-64, almost every internet user can now be reached via social media. Ninety-eight percent of internet users say they're visiting or using social networks each month. And 78 percent of the internet population aged 16-64 are networking with a mobile device.[5]

- **Passive social networkers continue to climb.** 42 percent of digital consumers use social networks to stay in touch with friends. But we're also seeing an increasing number of passive behaviors on social networks. For example, 39 percent use social networks to access the news. Similarly, 39 percent use social networks to fill their spare time (which is why social networks are racing to fill feeds with monetizable video content).[6]

- **All eyes turn to mobile-first social videos.** The explosion of video consumption is driven by five forces: smartphones, shorter attention spans, binge-watching, the importance of context, and the thrill of novelty.

In the battle for mobile video attention, Facebook has climbed to the top, gaining 48 percent of total video views in Q1 2017, according to a study by the research firm L2.[7] As Mark Zuckerberg stated in Facebook's Q2 2017 earnings report, there's no sign of this slowing. "Over the next few years, the much bigger driver of the business and determinant of how we do is going to be video, not Messenger."[8]

Brands, of course, have moved with the social video tide. According to L2, video made up 21 percent of brand posts in Q1 2017, an increase of 6 percentage points from Q1 of 2016.[9]
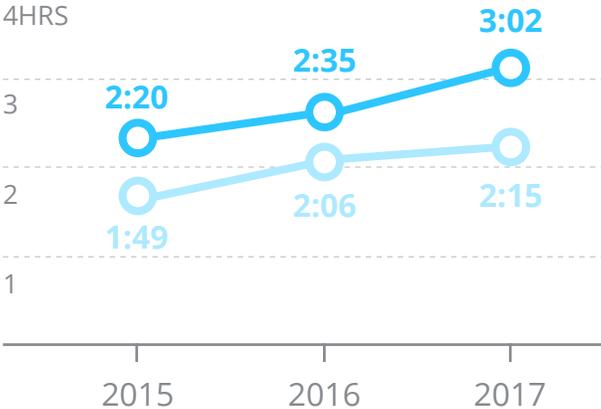
Social media in the purchase journey
online product research

% who say they use social media to research / find products to buy
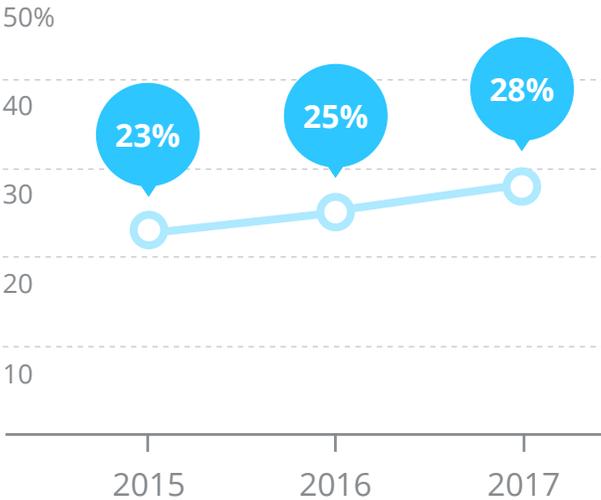
Time spent per day on mobile and on social media

- Mobile
- Social Media

- **Social media's role in the purchase journey expands.** Social continues to gain ground as a source of information for brands and products. In a study of 178,421 global internet users aged 16-64, GlobalWebIndex found that 28 percent of users turned to social networks during their online product research, a number that we've seen jump every year. They also found that 46 percent of all global internet users are following brands on social media.

  As we move into 2018, we'll see more consumers researching new products on social and making social a key part of their buying journey.[10]

- **One in every three minutes online is spent on social networking.** According to comScore, Daily time spent on social increases every year across all markets and all major demographics. One in every three minutes online is spent on social networks or messaging apps.[11]

- **Social overtakes search for 16-24 year-olds.** For online product research, search still leads the way. But social is catching up. 41 percent of global internet users say they use social to research new brands or products. And among 16-24s, social has overtaken search engines as a brand discovery and research channel.[12]

  As more consumers research potential purchases on social networks, it's a short leap to buying directly on Facebook, Pinterest, or Instagram. Chatbots will help consumers transition to social commerce, making it easy and seamless to discover products, ask questions, process digital payments, and see automatic updates on your order's delivery date.

- **Social networks serve more ads, while consumers block them.** While social networks rush to offer more advertising features, consumers battle back with ad blockers. Research from the publishing analytics company Pagefair found that 11 percent of the global internet population now blocks ads on the web.[13] And eMarketer estimates that 41 percent of millennials will use ad blockers by the end of 2017.[14]

  The rise of ad blocking is a loud warning to brands that consumers still resist and resent broadcast-style marketing tactics. From Snapchat's self-serve advertising tools to Facebook's Messenger ads, social networks will offer a stream of new social advertising features in 2018. But brands risk alienating customers if they only serve social ads without building genuine audience engagement and customer relationships on social channels.

- **The future of online product research: visuals and voice.** The rise of voice searches fueled by technology like Google Home and Amazon's Alexa has been well-documented. But visual searches are also on the rise. Products like Pinterest Lens use machine learning to aid in brand and product discovery.

  Social analytics companies are also expanding their brand monitoring tools to include visual searches, helping brands listen for more than keywords and textual chatter. As Pinterest's founder and CEO Ben Silbermann puts it, "a lot of the future of search is going to be about pictures instead of keywords."

Top 10 product research channels

% of internet users aged 16-64 who use the following to research brands/products

Search engines	52%
Social networks	41%
Consumer reviews	35%
Product and brand sites	31%
Price comparison websites	25%
Mobile apps	25%
Video sites	17%
Discount voucher and coupon sites	17%
Question-and-answer sites	17%
Blogs on products or brands	16%

Source: GlobalWebIndex, GWI Commerce, Q3 2017. Base 89,029. Internet Users aged 16-64

Consumers are skipping search engines and going straight to social

Search engines vs. social media
in the online purchase journey.

% who say they mainly use the following
when researching brands, products, or services:

■ **Search engines**
■ **Social media**

58%
30%

60%
34%

46%
38%

54%
57%

60%
64%
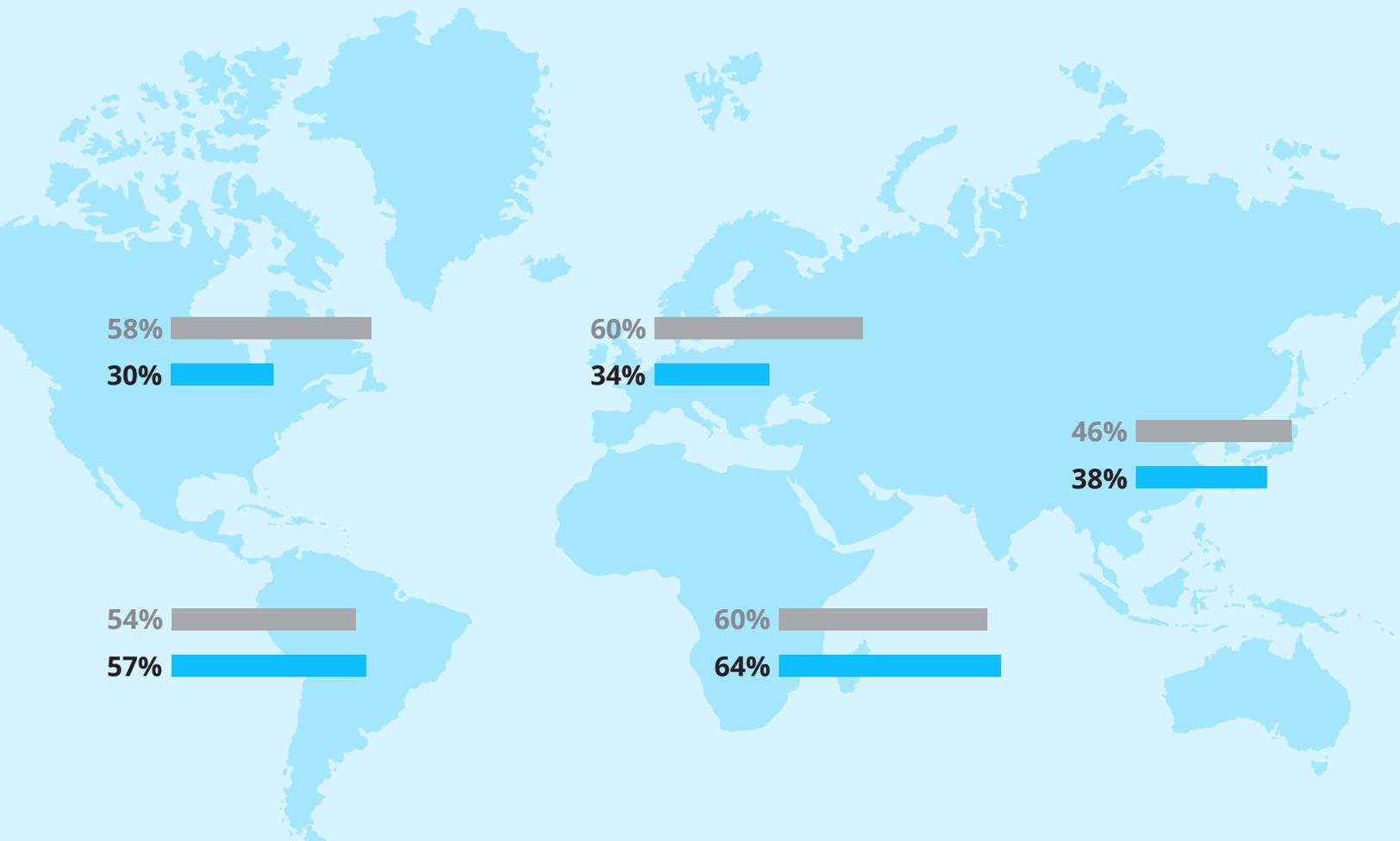
Source: GlobalWebIndex

TREND 1
The evolution of social ROI

For years, organizations have struggled with ROI. But many marketers are finding success by broadening the value of social across the customer lifecycle.

As their social media strategies mature, organizations are rethinking their metrics and realizing that strict ROI calculations (which divide revenue by cost) only capture part of social's value.

According to a study of 400+ marketing leaders by Altimeter (in partnership with Hootsuite), organizations are seeing business value beyond top-of-funnel activities. Brand awareness and customer service still topped the list—but organizations are also using social to guide customer insights, gather competitor intelligence, grow loyalty, and lower operational costs.[15]

While organizations have matured in how they're using social channels, the question of how to measure the value of social media persists. One critical finding in the Altimeter study was that 37 percent of social marketers use metrics because they are "standard activity metrics for measuring social" and "included in the social technologies we use".

In other words, measurement frameworks are often dictated by what data and metrics are provided in native social media networks. This leads to social-network-focused ROI measurement (traffic, reach, engagements) which can be difficult to track back to real business value.

We're finding that the CMO's role in ROI measurement is critical. Without clear business priorities set by the CMO, social teams tend to default towards measuring social media content performance (shares, share of voice, and virality) as these metrics are easily available in native tools.

Instead, social media strategies need to be driven by top-down business priorities. Work with your CMO to understand the core business priorities for 2018, and then create targets that will help you track social's contribution against those goals.

A key shift we're also seeing is that the ability to measure is becoming a key criteria for investment in new tactics. "What's important," says Altimeter, "is that you build a path toward measuring the impact of social on real business goals … the ability to measure or derive insight should be one of your most important criteria when planning initiatives."

84%

of social marketers track and measure the effectiveness of our social media efforts against defined goals and objectives, yet 29% are still trying to prove its value.

Altimeter, Beyond Social ROI: Unlocking the Business Value of Social Media

37%

of social marketers use metrics because they are "standard activity metrics for measuring social".

Altimeter, Beyond Social ROI: Unlocking the Business Value of Social Media

56%

of respondents said that not being able to prove the ROI of social media made it difficult for their organization to be successful with social media.

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To what extent are you measuring the business impact of social on each of the following?

Category	We have set established KPIs that link social to these areas	We have tried to measure the impact of social but do not have the right metrics in place	We are not measuring the impact of social but are looking into how	We are not measuring the impact of social and do not have plans to
Customer service	48	40	12	1
Brand awareness and reach	48	39	11	2
Customer experience and engagment	48	40	9	4
Understanding customer preferences	47	44	10	
Marketing campaign effectiveness	46	36	16	2
Sales and revenue	46	39	13	2
Brand reputation	45	42	12	2
Customer loyalty	41	43	12	3
Operational efficiency / management	37	41	17	4
Competitive intelligence	37	42	16	4
Employee advocacy	30	44	19	7

Source: Altimeter and Hootsuite, "Beyond ROI: Unlocking the Business Value of Social Media," 2017.

Hootsuite's key recommendations for this trend

✓ The basics

- **Aim at your easiest target first.** Understanding the impact of dark social on your ecommerce purchases is a worthy goal. But a goal like this is complex to untangle and requires analyst resources.

- **If you're struggling to measure social ROI, invest in activities you can measure.** Set a simple revenue target such as boosting conference attendance with social or reducing customer churn by identifying at-risk customers with social listening. Or use direct response tools offered by social networks to draw a straight line between social media activity and direct sales.

- **Nail the basics with UTM codes.** Hootsuite's soon-to-be-released Campaign Collaboration feature allows you to create predefined campaigns with time limits, message tags, and dynamic UTM tracking parameters. With this feature, you can easily track every link, creating a full picture of campaign attribution in Google Analytics, Adobe Analytics, Webtrends, and other analytics solutions.

🚀 Advanced

- **Follow Hootsuite's Define, Measure, and Prove framework.** Most organizations we work with rush too quickly into the "prove" stage for ROI. Use Hootsuite's Define, Measure, and Prove framework to evolve how your organization defines and tracks the value of social media.

- **Map social metrics to business outcomes.** Select social metrics that clearly demonstrate progress against real business outcomes—not just metrics provided by the social networks. Use Altimeter's social metric map (see page 11 of the report) to align your content metrics with concrete business outcomes.

- **Watch: ROI measurement training.** With Hootsuite Impact, you can finally track the revenue contribution of organic and paid social. In these training videos, you'll learn how the solution works, including how to conduct social lift and ROI analyses.

Mobile fuels the growth of social TV

As more consumers watch videos on mobile devices, social networks rush to expand their video offerings with 'made-for-social' programming, innovative livestreaming features, and increased organic discovery of mobile video content.
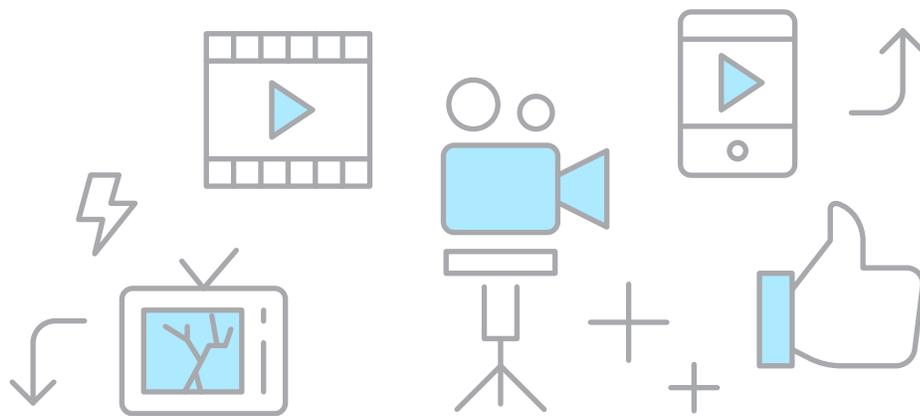
Mobile usage, shorter attention spans, and the thrill of novelty have accelerated the consumption of video content. The old buzz phrase used to be that "brands need to be publishers." But in 2018, social networks will encourage brands to become broadcasters as mobile video and social TV-style programming take the spotlight.

What's causing this shift towards TV-style content? To begin, social networks are simply following audience behavior. Passive social behaviors—such as looking for entertainment on mobile devices, catching up with news, and killing time between other activities—continue to climb. To engage (and monetize) these mobile moments, social networks are creating more TV-style content, partnering with traditional media brands, and building new ways for brands to broadcast live to their audiences.

For social networks, the benefits are clear: high user engagement and new advertising inventory to sell. According to Zenith's latest Advertising Expenditure Forecasts, internet advertising will "overtake advertising in traditional television to become the world's biggest advertising medium, accounting for 37 percent of total ad expenditure." Internet ad spend grew by 18 percent YOY in 2016 and an estimated 11 percent in 2017.

For some businesses, social TV offers innovative ways to increase organic reach. A study by L2 found that live video engagement rate in June 2017 was 25% higher than the overall Facebook video engagement rate.[16]

Snapchat also offers mass access to mobile-obsessed millennials. For example, Snapchat's original program *Phone Swap* gained 10 million viewers per episode. The made-for-social TV series was so successful it was picked up by TV networks and will be turned into a full-length television show.

Traditional TV networks might feel threatened. But social TV content has a long way to go before it replaces broadcast TV content and living-room viewing. While creating social-style TV content might be the trend of the moment, there's one thing that's unlikely to change: Mobile video content will continue to be a key content format for engaging mass audiences online.

Facebook will invest $1 billion in original social-first programing for their Watch tab, helping users find and subscribe to video series. YouTube is already making big bets with large-scale productions from top YouTube creators, as well as livestreaming and content partnerships with traditional media and sports brands. YouTube reported that users are logging 100 million hours of watch time in the living room every day.[17]

"Over the next few years, the much bigger driver of the business and determinant of how we do is going to be video, not Messenger."

Mark Zuckerberg,
Facebook Q2 2017 Earnings Conference Call.

56%
of internet users have watched a video on Facebook in the last month.

GlobalWebIndex, GWI Social, Q3 2017

33%
of internet users are using social media to find entertaining content.

GlobalWebIndex, Social Motivations, Q1 2017

The rise of social video viewing

% of internet users who watched a video on Facebook, Instagram, Twitter or Snapchat last month.

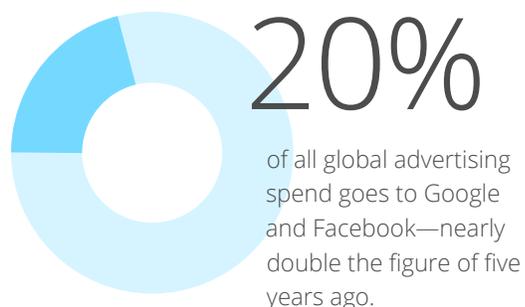60%

40

20

38%

51%

56%

2015   2016   2017
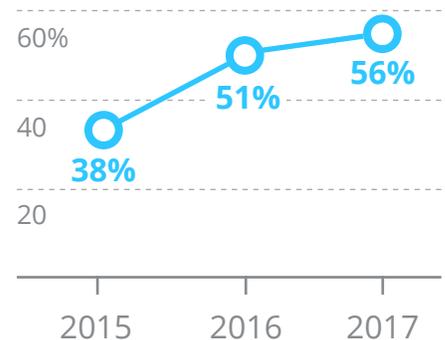
Source: GlobalWebIndex Q3 2015 - Q2 2017
Base: 443,016 Internet Users aged 16-64 excl. China (across all waves of research)

Facebook's aggressive move into video puts more pressure on YouTube. Facebook offers brands strong engagement and community features to help more users discover original programing. According to the research firm L2, brand videos on YouTube received 54 percent fewer video views per video than Facebook, making Facebook king for engagement.[18] And as a sign of the digital times, Nielsen now credits video views on Facebook, YouTube, and Hulu in its digital content ratings.
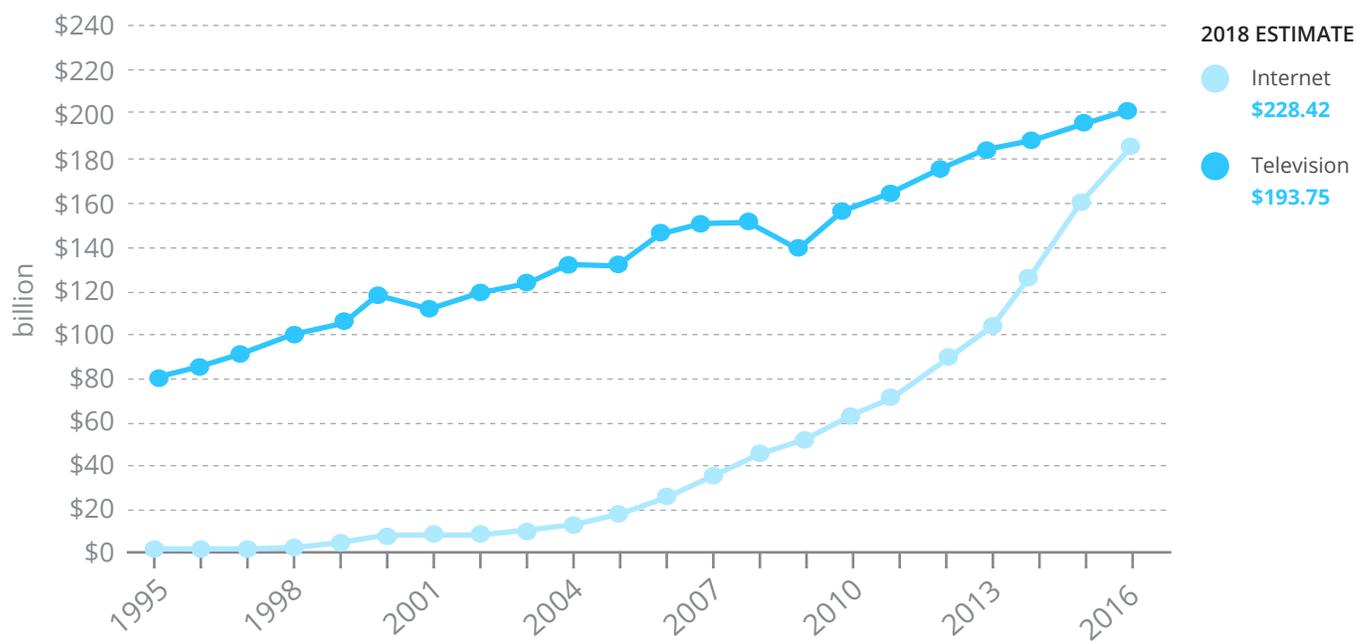
Creating TV-style social video content holds lot of potential for brands, especially as it opens up new advertising inventory, innovative sponsorship opportunities, and a continued boost in organic reach as Facebook favors video content over text and photos.

Being a broadcast brand works for some. Samsung, for example, used a 90-minute Facebook Live segment to launch their Galaxy 8 smartphone, gaining 1.6 million views and 14 thousand shares. But TV-style content or live broadcasting doesn't fit every product or every business model. While social networks push video content, consumers will likely still favor interactions, relationships, and genuine brand interactions rather than streams and feeds filled with video advertising.

20%

of all global advertising spend goes to Google and Facebook—nearly double the figure of five years ago.

Zenith, Advertising Expenditure Forecasts June 2017

Internet advertising spend outpaces TV

2018 ESTIMATE

● Internet
$228.42

● Television
$193.75

According to Zenith, 42 percent of all global advertising spend will be digital by 2019. **Source:** Zenith, Advertising Expenditure Forecasts June 2017

Facebook Watch: Inspiring brands to follow

Facebook's Watch tab is designed to help brands build communities around video content. Users can follow creators, connect with people watching an episode, and join groups of people with similar interests. Here are few shows helping to define the format of this new social content.

- Business Insider is launching four new shows, including an addictive show called *It's Cool, But Does It Really Work?*, which puts tech gadgets and trending technology to the test. Watch an episode on Facebook here.

- Hootsuite's CEO Ryan Holmes has launched a live pitching show for young entrepreneurs called *LOI: Live Pitch*. In the show, young entrepreneurs make their pitch for VC funding in a real-time format. Watch an episode on Facebook here.

Hootsuite's key recommendations for this trend

The basics

- **Only explore broadcast content if it makes sense for your brand.** If content creation isn't your brand's strength, look for new ad formats and partnerships as more brands create original video content and made-for-social TV segments. You can learn more about new video ad formats and in-stream advertising opportunities from Facebook here.

- **Don't blindly follow metrics from social networks.** In 2018, social network networks will look and act more like media companies. New video tools and ad formats will lean towards metrics like reach, frequency, and traffic. These metrics will make sense for some brands. But make sure you set and track metrics that reflect your business priorities, not the metrics set by social networks.

- **Find the right network for your video goals.** If you want organic reach, focus on Instagram's video options for B2C and LinkedIn for B2B; Facebook for reaching mass audiences with a combination of video and paid promotion; and Snapchat for distribution and discovery. For organic engagement, test emerging niche video networks platforms like Musical.ly and YouNow.

Advanced

- **Combine SEO and Facebook Live.** Facebook also now integrates Live videos into their Facebook Search tab, helping to fuel organic discovery.

  Once your Live broadcast is complete, Facebook videos are also indexed by Google. Target high-volume keywords and include a text summary under the video to be picked up by the Google bots. You'll see more video in search results in 2018. Google, for example, will soon roll out silent six-second previews for videos that autoplay in search results.

- **Shift emerging network budgets back into Facebook.** Many of our customers dedicate 20 percent of their ad budgets to emerging networks and channels. As Facebook's advertising and targeting become even more sophisticated, consider moving that budget back into Facebook. Often, you can reach the same customers but with sharper ROI reporting and refined audience targeting.

TREND 3

Trust declines, while peer influence rises

Micro-influencers, real customer communities, and "people like you" take center stage as consumer trust continues to decline.
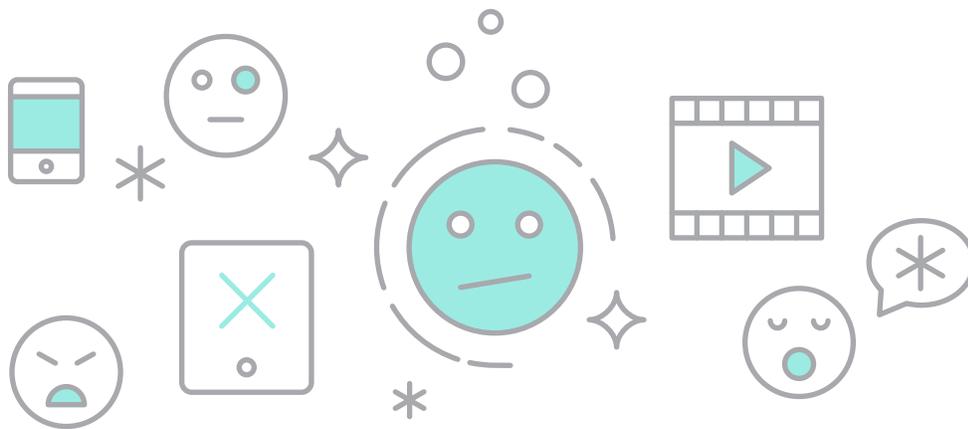
In 2017, consumer trust in mainstream institutions such as the media, CEOs, and government institutions sunk to historical lows. The 2017 Edelman Trust Barometer found that that two-thirds of the countries surveyed are now "distrusts," which means they have under 50 percent trust in the mainstream institutions of business, government, media, and NGOs to do what is right.[19]

As governments and corporations fail consumers, those consumers are turning to a familiar source: each other. For the first time in history, "a person like you" was ranked as credible as a technical or academic expert and more credible than a CEO or government official.

With political and social shifts, employees, micro-influencers, and customer advocates have never been more relevant. "'The primary axis of communications," says Edelman, "is now horizontal or peer-to-peer, evidence of dispersion of authority to friends and family."

According to Edelman, 50 percent of global respondents say individuals are more believable than institutions. And a company's social media page is more believable than advertising.

In this new world, authority even talks different. "Spontaneous speakers are more believable than those who are rehearsed, and those who are blunt and outspoken are more believable than those who are diplomatic and polite."

As trust declines, marketing leaders are also wary of overhyped results from inflated follower metrics and inauthentic influencers. In 2018, there will be a renewed focus on building authentic engagement and genuine influence.

While influencer marketing has challenges, it is clear that peer-to-peer influence will continue to grow. According to GlobalWebIndex, 50 percent of all global internet users are posting reviews online each month.[20]

Micro-influencers—defined as having between one thousand to 10 thousand followers—can also help ensure that you're reaching real customer communities. As Edelman puts it, "micro-influencers often have deeper engagement and therefore actual influence over their communities, who generally act with more passion as they feel a greater sense of relatability to the influencer."[21]

Businesses that succeed in 2018 will put their people—employees, advocates, customer communities, and online influencers—at the center of their marketing strategy.
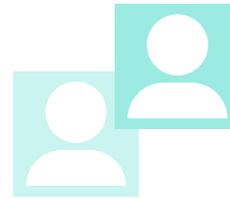
'A person like yourself'

is now as credible as an academic or technical expert and far more credible than a CEO or government official.

Edelman, 2017 Global Trust Barometer

50%

of all global internet users are posting reviews online each month as peer-to-peer influence and advocacy increases.

GlobalWebIndex, Brand Discovery Insight Report Q3 2017

50%

say individuals are more believable than institutions, and a company's social media page is more believable than advertising.

Edelman, 2017 Global Trust Barometer

Brand examples to follow

- **Apple's #ShotoniPhone campaign** blurs the line between customer advocacy and product advertising. Watch their official Instagram account @Apple, which launched in 2017, for how they develop this customer- and creator-focused story. To date, 1,825,954 posts have used the #ShotoniPhone hashtag on Instagram.

- **Qatar Airways**, **Red Bull**, **BMW**, and **Wayfair** are brands that source over 50 percent of their Instagram content from their community of fans. They offer smart examples of peer-focused sharing and real community building, rather than chasing short-lived bursts of influencer attention.[22]

- **Chewy.com**, a popular pet supply retailer, has built a successful customer advocacy program (#chewyinfluencer). Customers receive free orders in exchange for a review shared on Facebook. It's a clever (and completely transparent) way to build
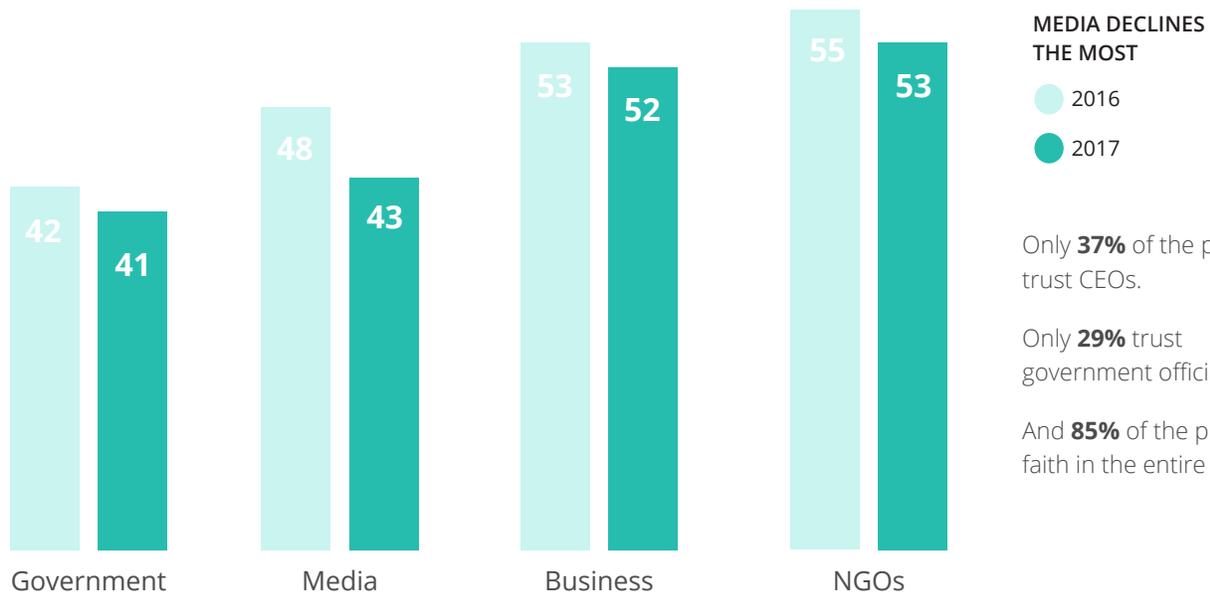
trust, especially as more consumers use social channels to research products and services.[23]

- **MVMT**, a watch brand, works with both micro- and mega-influencers. As documented in [L2's Influencers 2017 report](#), MVMT uses standardized discount counts across all influencer-sponsored posts. This lets them track the ROI of micro-influencers versus high profile endorsements (such as their partnership with millennial celebrity Alyssa Lynch).[24]

The brand also lets influencers curate their favorite products on dedicated landing pages, allowing the influencer to promote products in an informal and personal way. According to L2's analysis, "more than a quarter of MVMT's site traffic comes from social media, almost four times more than the industry average."[25]

The erosion of public trust
% trust in the four institutions of government, media, business, and NGOs, 2016 vs. 2017

	Government	Media	Business	NGOs
2016	42	48	53	55
2017	41	43	52	53

MEDIA DECLINES THE MOST

- 2016
- 2017

Only **37%** of the public trust CEOs.

Only **29%** trust government officials.

And **85%** of the public lack faith in the entire system.

Source: Edelman's 2017 Trust Barometer

Hootsuite's key recommendations for this trend

✓ The basics

- **Set long-term goals for employee and customer advocacy.** Most organizations turn to advocacy as a way to fight declining organic reach. This gives your brand a traffic boost but misses the real value: building real and lasting human relationships with customers and employees.

  Set long-term goals and get leadership to commit to creating real customer and employee advocacy, rather than chasing quick fixes to boost organic traffic.

- **Build advocate communities with Facebook Groups.** Facebook is investing heavily in Groups as they look to increase user engagement (and future ad space) beyond the News Feed. This is a significant opportunity to both gain a new source of organic customer engagement on Facebook, study customers in their natural habitat, and build real advocacy. We think Facebook Groups are a significant opportunity in 2018.

- **Generate interest with ads but support product research on your company's social media.** Ads are great at gaining attention. But trust in advertising has declined to historical lows.

  Edelman found that 62 percent of global consumers were likely to trust information on a company's social media presence, whereas only 38 percent would trust information from advertising. From views on industry issues to crisis handling, employees were seen by global consumers as the most credible company spokesperson—more than CEOs and company executives. According to Edelman, employees on average are trusted more than CEOs on crises, innovation, and industry issues.[26]

🚀 Advanced

- **Go unscripted and live on Facebook.** Whether you're getting a YouTube influencer to review your new product, speaking on a webinar, or getting your CMO to share an insight on Facebook Live, relax on the rehearsals. According to Edelman, 57 percent of global consumers were more likely to believe a spontaneous speaker, versus 43 percent that would trust a speaker that sounded scripted and rehearsed.[27]

- **Build micro- and macro-influencer strategies.** According to research from L2, mega-influencers are useful for getting simple product messages to spread far and wide (such as new CPG products aimed at broad demographics), whereas micro-influencers are key for influencing purchase criteria.[28]

  For example, a mega-influencer might help to put a next-generation smartphone on the radar of early tech adopters, but a micro-influencer with a small army of loyal online commentators would be key to influencing how the product is perceived in places like Reddit, forums, and Facebook Groups.

Humans, meet AI

The machines have risen. But brands need to make sure artificial intelligence strategies stay focused on being human, helpful, and relevant at scale.

From how people discover new brands to how they order products, we're quickly moving into a world where experiences make our social interactions with brands more relevant to our individual preferences. "Computers are adapting to people, rather than people needing to adapt to computers," says Sundar Pichai, CEO of Google. "In the long run, we're evolving in computing from a 'mobile-first' to an 'AI-first' world."[29]

AI might feel like a future-facing trend. But the robots are already among us. If you've used Google Photos, you've benefited from machine learning that sorts and manages your memories. If you've created an ad campaign on Facebook, you've likely noticed that it's getting easier to optimize ads and faster to find insights in reports.
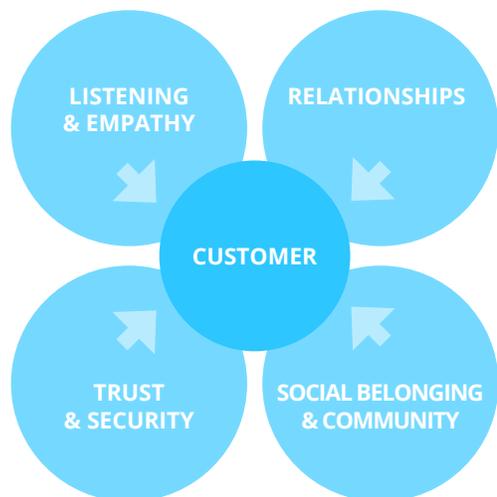
Facebook recently acquired AI startup Ozlo to help them transform Messenger into a personal social assistant. But even now, Messenger can use artificial intelligence to make suggestions for users based on their private conversations. Messenger can book you an Uber, send money to a friend, and recommend local hotels or services based on what you're chatting about. For example, the fashion brand Levi Strauss & Co. launched an AI-based Facebook Messenger bot called Virtual Stylist that helps interested customers pick the right style of jeans.

"The system learns from the things you like to do and you don't like to do," explains David Marcus, Facebook's head of messaging products, in an interview with Recode. "If you don't use the things that are being suggested for a specific use case, gradually those things will go away."[30]

Keep your AI investments grounded in the never-changing human needs of customers. In 2018, make sure you stay focused on solving real customer problems, such as helping Facebook customers research a new travel destination faster with a Messenger bot, or serving more personalized messages based on past conversations. Whether your organization decides to invest in AI or not, this will be a trend to watch and one that will quickly change how brands and consumers communicate on social channels.
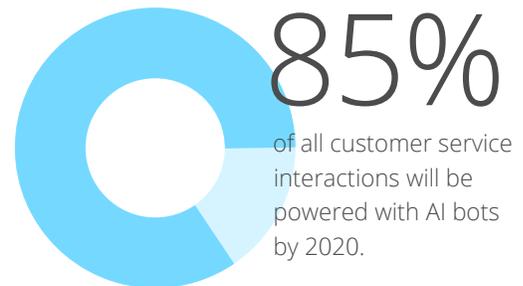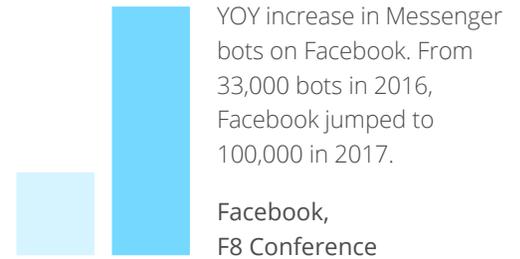
+200%

YOY increase in Messenger bots on Facebook. From 33,000 bots in 2016, Facebook jumped to 100,000 in 2017.

Facebook,
F8 Conference

85%

of all customer service interactions will be powered with AI bots by 2020.

Gartner, Gartner Predicts a Virtual World of Exponential Change

38%

of the companies surveys used artificial intelligence in 2016—but by 2018, this percentage will increase to 62%.
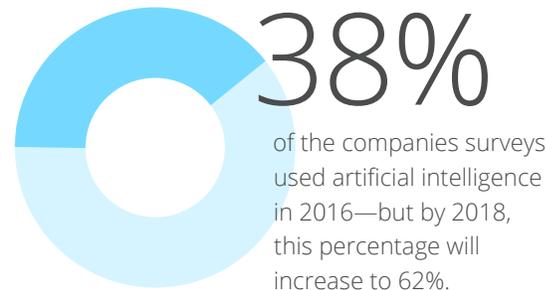
Narrative Science, Outlook on Artificial Intelligence in the Enterprise

Universal customer motivations
Make these the pillars of your marketing strategy

LISTENING & EMPATHY

RELATIONSHIPS

CUSTOMER

TRUST & SECURITY

SOCIAL BELONGING & COMMUNITY

Keep your AI investments grounded in the never-changing human needs of customers.

Hootsuite®

Brand examples to follow

We spoke with Conversable, a company that helps brands use AI to create automated experiences on messaging and voice channels. Here are a few examples of how you can add AI to your social marketing strategy.

- **TGI Fridays makes social more personal.** Conversable developed Facebook Messenger, Twitter, and Amazon Alexa chatbots for popular restaurant chain TGI Fridays. The bots can help customers quickly find available reservation times at the nearest restaurant, browse and order their favorite food, and even ask frequently asked questions.

   The data from these interactions can then make the experience even more personalized for customers. So if a customer makes an order one week, Fridays can then issue an offer to let the consumer make the same order in a checkout cart, which the consumer can approve with a single click or opt to modify. These offers have yielded a click-through rate of 70 percent.

- **Shake Shack answers customer questions faster.** Popular fast food franchise Shake Shack was looking to extend their brand to wider audiences on Facebook and Twitter. The Facebook Messenger and Twitter chatbots they developed with Conversable weren't initially focused on taking orders, but rather on engagement and offering quick answers to common questions. The bots were capable of answering over 300 frequently asked questions and presenting the menu.

   While not initially focused on sales and orders, the bots gathered data about specific questions customers were asking most often, allowing Shake Shack to know where to focus attention, and helping the company optimize and personalize sales in the future.

Hootsuite's key recommendations for this trend

✓ The basics

- **Get a free AI report robot.** AI won't just save marketers time performing tedious tasks—it's already helping to find insights faster with natural language generation and predictive analytics. For example, Narrative Science's free Quill Engage Google Analytics tool will automatically analyze and summarize your traffic in a report written by a robot. It's free to use. You can even configure custom segments (like social traffic and conversions) in Google Analytics. Get your free robot report here.

🚀 Advanced

- **Focus on one of the four AI use cases.** AI is a broad subject. In general, social marketing can use AI technology to help with four uses cases.

   - **Social commerce:** Help customers research or complete purchases. For example, SnapTravel allows users to message their basic travel information to their Messenger bot, which then responds with hotel options.

   - **Customer care:** Use a bot to reduce FAQ interactions that could easily be automated, giving social teams more time to build relationships and delight loyal customers.

   - **Content delivery:** Help social audiences binge-consume related content after discovering you on social channels.

   - **Analytics:** Reduce manual reporting and use predictive analytics to arrive at insights faster.

- **Build with a bot template.** Find a solution partner that can augment your existing social media strategy (such as customer support on Facebook) with AI technology. For example, if you're thinking of building a bot, these solutions let employees write and modify responses for their bots without engineering support.

TREND 5

The promise (and reality) of social data

Social data can help marketers gain new influence and recognition in the enterprise. But to realize its promise, there's still work ahead.

From linking social data to CRM profiles to converting raw consumer sentiment on Instagram into polished customer insights, organizations have spent years chasing the potential of social data.

Social data's potential remains. But organizations have realized that collecting data is the easy part. Integrating social data with other analytics systems—or extracting usable insights from mountains of social mentions—requires a lot of work and more resources than they originally thought.

Econsultancy and the analytics consultancy Lynchpin surveyed 900 marketers and supply-siders in the U.K. and Europe. They reported that only 39 percent of analytics data is useful for driving business decisions.[31]

We saw a similar sentiment in the most recent CMO Survey from Duke University's Fuqua School of Business. In their study of 388 top U.S. marketers, they found that fewer than one-third of projects used analytics prior to a decision. The troubling part is that this is down from 37 percent five years ago.[32]

It's not that marketers' need for insights has diminished, though. ROI continues to be a key challenge for our customers. And in the CMO Survey, CMOs said they planned to increase their spending on marketing analytics by 229 percent in the next three years.

It's not easy to unlock social data—but if you do, it can give you many strategic advantages. By positioning social data as a source of customer insights (rather than just a measure of how social content performs), marketing teams can break down department silos, win approval (and more headcount) from executives, and better prove the strategic value of social to the broader business.

Why do organizations struggle with social data? Many have underestimated the resources it takes to integrate social platforms with CRM systems and existing enterprise systems. Social data is unstructured and the APIs vary by network, making it difficult to build a 360-degree view of customer behavior. Unless you invest in analyst resources, it's difficult to unite these data sources.

Culture and politics also play a role. Marketers and social teams have a lot to gain by elevating the role of social in their organization. But you'll face different departments with competing agendas, making social data political and hard to democratize.

Despite these challenges, organizations are making progress. As Altimeter (in partnership with Hootsuite) found in their study of 400 marketing leaders, respondents cite "faster decision making", "identifying new market opportunities" and "risk management" as additional benefits of understanding and leveraging social data.[33]

According to social analytics company Brandwatch, 96 percent of all conversations online are unbranded.[34] Only focusing listening efforts on the four percent of online conversation that is specifically about products and brands misses the larger opportunity for deep customer insight and brand growth.

In 2018, social teams have a lot to gain by using social data to break down social marketing silos, helping them gain their rightful place as one of the best sources of customer insight that has value across the organization.

94%

of all online conversation is unbranded.

Brandwatch, Dark Matter, Social Media, and the Number 96
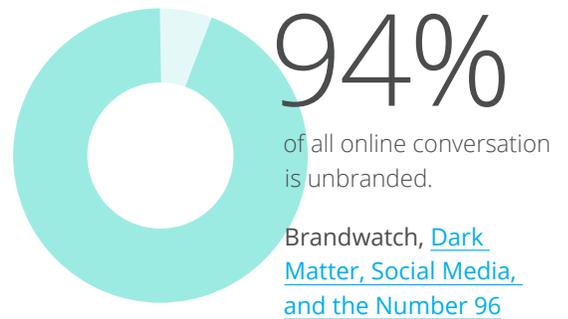
Hootsuite's key recommendations for this trend

The basics

- **Use Facebook's new ability to gather competitive intelligence.** Social data doesn't need to be restricted to customer insights. Due to political pressure, Facebook removed "dark posts" in 2017. In the past, these were used by brands to target specific customer segments or run ad campaigns that were hidden on their main Facebook Page. Now, you can use this new transparency to study the Facebook ad strategies of your rivals.

  This is an easy tactic to implement and a quick way to start proving the broader business value of social insights.

- **Get comfortable making assumptions.** The more familiar you get with social data, the more you'll realize that every social platform measures things differently. And they rarely speak to each other. Some platforms have APIs; others leave you in the dark.

  Peer-to-peer sharing (in messaging apps like WhatsApp and Snapchat) often makes up the lion's share of your social traffic. These "dark social" platforms are difficult to track using traditional web analytics. Marketers need to learn how to comfortably navigate incomplete or disparate sets of data to pull out as many insights as possible to make better decisions and guide new strategies.

Advanced

- **Combine social data with traditional market research.** Layer social data with traditional market insights, helping your organization better understand customers' motivations or identify new segments to target.

  Run a research project—such as identifying new areas of product growth—and combine data you collect on social channels with traditional surveys, focus groups, and other forms of market research.

- **Get your CMO to champion social data.** CMOs are expected to represent the voice of the customer at the executive level. There's no better source of customer intelligence than social data, especially when combined with other sources of insight from around the organization. But to earn the attention of the CMO, you need to speak their language.

  One of the common mistakes social teams make is presenting network-specific metrics that only speak to content performance. Instead, apply social data to the most urgent business challenges in your organization (such as increasing upsells, reducing support costs, improving customer experience, or lowering churn rates).

  Begin with the data you can access, get comfortable making assumptions, and then ask for more resources to begin making social data a regular part of market research and customer insight.

Where social networks are headed in 2018

Facebook
**Global connectivity.
Social marketing platform.**

With 2 billion users and 70 million businesses on Facebook, the social media giant will search for ways to monetize beyond the News Feed.

Mobile video is Facebook's biggest bet in 2018. But they'll also boost brand discovery via the new Explore tab; use AI to encourage more people join the 100 million people using Groups; and accelerate organic and paid Messenger interactions.

Customers will see direct benefits from AI this year, with simplified ad targeting and improved predictive analytics that will surface insights from reports.

Best-in-class brands to learn from:
Accessory company **Nomad** used Custom Audiences to create a multi-country Lookalike audience, targeting an international audience across Facebook, Instagram, and Audience Network. The campaign led to a 2.7 times return on ad spend.

YouTube
**Mobile streaming
and social TV platform.**

Google's revenue jumped up 23 percent in 2017, with much of their growth fueled by strong performance of mobile video advertising on YouTube.

With 1.6 billion users, YouTube will expand their mass-market reach with original social TV programing from YouTube Red, live broadcasting, and YouTube TV. Mobile remains key, but YouTube also saw a 70 percent YOY increase in living room viewing.

It's clear that YouTube's next phase of growth won't be from viral amateur content. Instead, expect more investment in YouTube as a social TV platform with unmatched advertising precision.

Best-in-class brands to learn from:
Bayer, **Ben & Jerry's**, **Louis Vuitton**, and **Volvo**.

Snapchat
**Mobile storytelling
and brand discovery platform.**

As social networks race to shift ad revenue away from traditional broadcast media, Snapchat will look to become the go-to-platform to reach younger demographics.

But as Instagram becomes the mainstream choice for brands, we'll likely see Snapchat become more of a niche social network. Snapchat's focus in 2018 will be finding a profitable path to growth, so expect to see a steady release of self-serve advertising tools and innovative ad formats.

In addition to exclusive content partnerships with major media and entertainment brands, Snapchat is also becoming a discovery platform for businesses of all sizes. Explore their self-serve ad tools, as well as searchable Stories, location-based Context Cards, and Snap Maps.

Best-in-class brands to learn from:
Phone Swap, a new show created with a joint venture with Vertical Networks, saw 10 million viewers for a single episode—comparable to a popular TV show.

CNN (Snapchat audience of 12 million) and **Bleacher Report** (audience of 16 million) are cutting a trail for other media brands to follow.

Snap has also expanded their ad options to include direct response formats. **The Economist** used Snap Ads with Attachment (their direct response format). Their average cost per lead was £10.28, compared to £62 on display.

LinkedIn
Professional conversation and content amplification platform.

Now reaching 530+ million professionals, LinkedIn has expanded their social features, which now include video creation tools, Google Hangouts and Facebook Messenger lookalike features for peer-to-peer communication, and Snapchat-style geofilters for events and conferences.

With expanded social features, expect to see more finance and luxury brands using LinkedIn to reach affluent consumers. LinkedIn has always had influencers, but a new opportunity is developing formal B2B influencer strategies on the platform—especially to harness new content amplification capabilities.

Data is obviously LinkedIn's most valuable currency. Expect to see expanded CRM integration with Microsoft's cloud products, helping B2B brands connect LinkedIn activity to closed deals.

Best-in-class brands to learn from:
With 1.4 million followers, Hootsuite's own CEO Ryan Holmes is one of the top 25 LinkedIn influencers. You can read about the mechanics of his LinkedIn thought leadership strategy in his book, The 4 Billion Dollar Tweet.

Instagram
Peer-to-peer sharing. Growing engaged communities.

Instagram's user growth sped up in 2017, adding 200+ million new users.

With the explosive popularity of Instagram stories (up to 250 million daily users) and enhanced live video features, Instagram's focus will remain on organic engagement. Instagram offers strong organic engagement, especially with the rise in peer-to-peer sharing, live video, and dark social (such as private messages and disappearing content).

In 2018, we'll see mobile video engagement continue to rise and extended advertiser options, including ads in Stories.

Best-in-class brands to learn from:
Ben & Jerry's used vertical video in Instagram Stories, gaining a 14-point lift in ad recall and a 2-point lift in purchase intent for their new Pint Slices ice cream.

Twitter
Real-time news, customer communication, and video discovery platform.

In 2018, Twitter will double down on their video strategy, expanding into more premium content partnerships, innovative live video segments, and applying machine learning to help personalize video discovery.

A core focus will be increasing premium livestreaming content (in 2017, Twitter streamed 830 premium events, such as weekly live NFL sports games). This opens up new advertising options, including in-stream sponsorships and in-stream video ads.

Twitter will continue with premium partnerships with brands. Opportunities for brands include improved video discovery features on the Explore tab, new direct response ad formats, and in-stream video ads that can reach a broad audience.

Best-in-class brands to learn from:
Innovative brands are creating exclusive live segments for Twitter. **Bloomberg**, for example, will deliver a 24/7 breaking news network that is global, live, and exclusive to Twitter. You'll also see new interesting shows like **Cheddar**, which will stream live from the New York Stock Exchange.

Pinterest
Visual search engine. Social product discovery.

Pinterest began as a social network. But going forward, the network will help build the future of visual search engines.

As Pinterest's founder and CEO Ben Silbermann puts it, "a lot of the future of search is going to be about pictures instead of keywords." Pinterest recently acquired Kosei, a company that specializes in personalized recommendation modeling. This will help fuel product discovery tools, using object recognition to boost pins and create more relevant product recommendations. Users can expect an experience tailored to their individual browsing habits and preferences.

Businesses of all sizes can also now run search ads, targeting the more than 2 billion searches on Pinterest every month. Pinterest offers significant opportunities for both organic and paid brand discovery in 2018.

Facebook marketing deep dive

Mari Smith's 2018 Facebook game plan

Facebook reigns as the top platform for social marketing. We spoke to Mari Smith, the world's foremost Facebook marketing expert, to learn what new features and tools brands should focus on in 2018.

What new video formats should marketers look out for?

I recommend that marketers create short, 6-15 second "snackable" videos for use as ads, and for insertion into longer videos and shows as ad breaks.

You'll also want to test creating videos of 90 seconds or more with educational storytelling content. Live video will continue to grow in popularity among businesses and media companies, specifically around highly entertaining content.

Along with a variety of excellent third-party Live broadcasting tools—for example, Wirecast, Ecamm Live, BlueJeans onSocial and BeLive.tv—Facebook will likely release its Live Video Producer. This tool will make it easier to create multi-input broadcasting.

Facebook always has a lot of interesting features and developments. What two or three strategies would you recommend that brands focus on in 2018?

Create more short-form video content for mobile consumption that is high quality, engaging, and captures attention very quickly. Design for sound off, delight with sound on. And make sure your video content is worthy of putting budget behind; don't even create videos for organic social reach if it's not worthy of promoting! Organic reach could eventually reach zero.

Remember, video is a tactic, not a strategy. Create a solid strategy behind your video content that includes multi-platform repurposing as well as email marketing, Messenger broadcasts, and influencer campaigns.

Facebook has really been on a mission this year to educate current and potential advertisers that all ads must drive business. Sheryl Sandberg calls metrics such as reach, engagement, video views, and lift in ad recall "proxy metrics." What counts is: Did your ad bring you a

qualified lead or make a sale? But you can't just put out a video ad and expect the cash register to ring. It has to be a process, focused on wooing your audience.

Any new Facebook ad formats you're excited about right now?

I'm excited to try Ads in Stories. These are already released on Instagram and likely coming to Facebook, particularly when Stories for business Pages rolls out.

We're seeing also that square video is outperforming landscape video. Square video takes up 78 percent more space in the Facebook News Feed and have a 67 percent higher completion rate than widescreen mobile videos. Marketers would do well to experiment with split-tested video ads: square, landscape, and portrait.

What about driving leads or direct sales? Any new formats to try?

Although not new ad products, Carousel and Dynamic ads have tremendous potential for advertisers. Carousel allows advertisers to showcase multiple photos and/or videos in the square format called "cards." The dynamic part automatically shows the most relevant products based on website visitors.

My last one is going to feel a tad creepy to some Facebook users, especially around the holidays. But Facebook is rolling out household targeting. The fairly new ad product is designed to influence buying, and gifting, decisions in the same household. To determine if people are members of the same household, Facebook considers the relationships people declare on their Facebook profiles, whether people share the same last name, their home locations, their on-Facebook activities like check-ins and life events, and where people connect to the internet.

Learn more from Mari Smith—including training courses, live webinars, and free resources to help you achieve Facebook marketing mastery—at MariSmith.com.

Tools to help in 2018

- **Measure social ROI:** Hootsuite Impact is a social analytics solution that helps you measure ROI and use social data to influence strategic decisions across your business.
Learn more at Hootsuite.com/products/impact

- **Reduce the cost of paid social:** With Hootsuite Ads, your teams can create higher performing social ads at a lower cost.
See how at Hootsuite.com/products/social-ads

- **Unite social and digital data:** Capture social data and send to Salesforce, Marketo, and Microsoft Dynamics with Hootsuite's ecosystem. Our platform also integrates with tools like Tableau, Adobe Analytics, and Google Analytics. Browse our integrations at apps.hootsuite.com

- **Build your measurement framework:** Hootsuite's Value Realization team helps enterprise organizations link business objectives to social metrics. From building measurement frameworks to setting competitive benchmarks, they'll guide you towards growth. You can read more about our approach to ROI measurement here.

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Hootsuite is the most widely used platform for managing social media, loved by over 16 million people around the globe and trusted by more than 800 of the Fortune 1000. Hootsuite Enterprise empowers organizations to execute business strategies for the social media era and scale social media activities across multiple teams, departments, and regions. Our versatile platform supports a thriving ecosystem of social networks complemented by 250+ business applications and integrations, allowing organizations to extend social media into existing systems and programs.

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