UNTANGLING THE SOCIAL WEB:
INSIGHTS FOR USERS, BRANDS AND RETAILERS

PART 3 OF 5: **SOCIAL NETWORKING PERSONAS:**
A LOOK AT CONSUMER AND SHOPPER MIND-SETS

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INTRODUCTION

Social networking is no longer defined by arbitrary status updates posted by Millennials. It has incredible scope and power that demand attention from users, brands and retailers. It is the most popular online activity worldwide and has altered the way we connect, share and build relationships with people and communities around the globe.

Social networking sites currently reach 82% of the world's online population, representing 1.2 billion users.[1] It has given power to the masses, creating overnight sensations via YouTube® and altering shopping behaviors with foursquare®, and has even changed the presidential campaign process through the use of Twitter® and Facebook®.

The digital landscape has experienced tremendous growth, innovation and technological advancements over the past several years. Five years ago, email was predominately sent from a computer, the iPhone® was a brand-new product, "'Twitter' was a sound, the 'cloud' was in the sky [and] '4G' was the name of a parking space."[2] The online world is moving rapidly, and brands and retailers need to understand the social networking landscape, its users, how it impacts their role and presence in the market and how they can affect the space.

To bring greater clarity to social networking and how it pertains to the larger retail and grocery industry, the Coca-Cola Retailing Research Council (CCRRC) of North America has partnered with The Integer Group® to provide a five-part series on the current state of social networking:

PART 1: *Assessing the Social Networking Landscape*
PART 2: *Identifying the Allure of Social Networking: Traits, Behaviors and Motivators*
PART 3: *Social Networking Personas: A Look at Consumer and Shopper Mind-Sets*
PART 4: *The Value of Social Networking for Brands and Retailers*
PART 5: *The Effectiveness of Professional Social Networking*

Throughout this series, we aim to provide the entire retail community with the foundational knowledge to decode the complexities of the social web and seed inspiration for how companies can set a path for change.

ABOUT PART 3:
KNOWLEDGE ABOUT THE FOUR SOCIAL NETWORKING PERSONAS.

UP NEXT:
PART 4: *THE VALUE OF SOCIAL NETWORKING FOR BRANDS AND RETAILERS.*

1. Comscore®. (2011). It's a Social World: Top 10 Need-to-Knows About Social Networking and Where It's Headed

2. Thomas Friedman. (2011, DECEMBER 7). Thomas Friedman on "*How America Fell Behind.*" Retrieved from http://www.npr.org/2011/09/06/140214150/thomas-friedman-on-how-america-fell-behind

SOCIAL NETWORKING PERSONAS: A LOOK AT CONSUMER AND SHOPPER MIND-SETS

The revolutionary power of social networking is evolving and advancing shopper decisions and habits. Smartphone-equipped shoppers who can intstantaneously price-check products is just one evolution that the social web has made possible. In fact, social networking is affecting shoppers throughout their purchase cycle. To stay relevant to shoppers, retailers and brands need to understand how their customers connect to them through the social web; how the simple act of 'liking' a company on Facebook, for example, changes each brand's interaction with them; and how shopping is evolving into an interactive experience and a daily discussion for many social web users.

This part of the series will help you build a knowledge base for strategic development by:

- *Defining the different social networker personas—their motivations, habits and practices.*
- *Examining how social networking creates the opportunity for great connection to your shoppers.*
- *Considering the social web's impact on the shopping experience before, during and after the shopping trip.*
- *Proposing some key activities your company needs to consider to ensure that you build a strong and sustainable presence and connection in the social web with shoppers.*

Note: See Appendix for full profiles of the social networking personas.

We must begin with understanding the various types of social networkers and their behaviors and motivations in the social web. To do so, we conducted a quantitative study to expose four distinct social web groups or personas—Bonders, Sharers, Professionals and Creators—that uncovered their mind-sets, motivations and behaviors.[3,4] We then conducted a qualitative research study to learn more about the attitudes and behaviors of these groups as they relate to social networking and shopping. In the end, the studies revealed that each persona demonstrates unique social networking characteristics, values, motivations and shopping practices that businesses are well-served to understand to interact effectively with the social web.

The Four Social Networking Personas:

-Bonder

-Sharer

-Professional

-Creator

'Liking:' The action on Facebook that feeds the 'liked' person, business or thing to the user's newsfeed.

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3. Integer®/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

4. New York Times®/Customer Insight Group. (2011). *The Psychology of Sharing: Why Do People Share Online?*

FOUR SOCIAL NETWORKING PERSONAS: MOTIVATIONS AND HABITS

THE BONDER

Bonders love to create and cultivate relationships with family, friends and work colleagues. They view themselves as fun, sociable and connected and are often the ones to host or plan a local event. Their main motivations for participating in the social web are to keep up with what's happening in others' lives, to share their own thoughts and ideas and to initiate introductions among those they know. They are more likely to be female and under 40 years old, and 63% are employed full or part time.[3,4,5]

Social networking has changed how Bonders connect. Facebook is the site they use most often, and they have been Facebook members the longest of the four segments (44% have been on Facebook for three years or more). A typical day involves frequent check-ins with family and friends. They place great emphasis on staying connected, with 65% of them using their mobile phones to connect from anywhere. They are the most likely of the groups to connect to social networking sites via their mobile phones to "pass the time" (46%).[3]

Note: See Appendix for full Bonder profile.

> "I typically just go on [social networks] to check my messages and posts from friends. See what they are up to in their day. Post statuses on Facebook, IMVU to share what I am doing today. Sometimes share photos or videos with my friends."[3]
> — Female, 18–24

3. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

4. New York Times/Customer Insight Group. (2011). *The Psychology of Sharing: Why Do People Share Online?*

5. Simmons. (2011 SUMMER). *NHCS Adult Survey 12-Month*

THE SHARER

Sharers love being able to spread the word on what's going on in their lives and circulate helpful information. They value dishing out their discoveries in the hopes that they will benefit the people that they care about. They are kind, helpful, sincere people who put primary importance on building stronger relationships. Being connected on the social web is vital; commenting on and sharing information makes them feel useful. They skew older and female, and approximately half are employed full or part time.[6,7,8]

Facebook is where they spend most of their time, viewing others' status updates and posting comments, but they also like to explore blogs, discussion boards and other sites to learn new bits of information. Throughout the day, they tend to log in to social media sites for about one to two hours and prefer doing so using the computer instead of their mobile phones.[6]

THE SHARER

"I like to read people's statuses and post my own on how my day has started. I then periodically check on the recent posts and will often interact with friends through comments. If I happen to have pictures that day, I may upload them; if not, then I will just interact."[6]
— Male, 25–34 years old

6. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

7. New York Times/Customer Insight Group. (2011). *The Psychology of Sharing: Why Do People Share Online?*

8. Simmons. (2011 SUMMER). *NHCS Adult Survey 12-Month*

Note: See Appendix for full Sharer profile.

THE PROFESSIONAL

Professionals are very career-focused yet strive for a work-life balance. They use the social web for professional networking or knowledge, but they also like to share and spread their opinions and relevant information with others. They want to be perceived as intelligent, efficient and organized and tend to be more introverted. Though professionally minded, they do not confine themselves to professional-networking sites. On a weekly basis, most are browsing LinkedIn® or Facebook, watching videos and reading blogs to ensure that they are up to date on current events, news and work-related issues. Seventy-five percent are employed full or part time, and they are more likely to be college-educated. [9,10,11]

Professionals leverage all the social web has to offer to help them connect, search for information and observe and absorb content. Though they are active online, their professional lives limit their time spent on the social web. Thirty-five percent spend less than an hour per day on social sites, and nearly 20% log in every other day. Their busy lifestyles lend to on-the-go activity, and 65% access social sites via a mobile phone. Professionals strongly value the easy, immediate access to information that social networking provides.[9]

Note: See Appendix for full Professional profile.

"Ease of access to pictures and media as well as people's thoughts that would be inaccessible due to distance [is something social networking uniquely offers]."[9]
— Male, 35–44 years old

9. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

10. New York Times/Customer Insight Group. (2011). *The Psychology of Sharing: Why Do People Share Online?*

11. Simmons. (2011 SUMMER). *NHCS Adult Survey 12-Month*

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Presented by **Coca-Cola Retailing Research Council & The Integer Group**

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THE CREATOR

Creators are outgoing individuals who use the social web to express themselves by originating and sharing content. Their personality is creative, unique and bold, and they enjoy continually learning new things. The social web gives them a stage to show people who they are, as well as giving them access to a plethora of information and people to connect with. They are more likely to be male, younger and culturally diverse.[12,13,14]

Their social networking activities are diverse and abundant. Most of their activity is on Facebook or Twitter. They post content, watch videos, read blogs and browse the web for personal updates from friends and family. Forty-six percent access their social sites first thing in the morning, and their activity persists throughout the day, with 33% spending three or more hours networking daily. They actively access social networking sites on their mobile phones (65%) and see it as a flexible way to create, share and learn in the moment.[12,14]

Note: See Appendix for full Creator profile.

"Facebook makes it very easy to share photographs or artwork and then categorize them. I get instant feedback from friends and other followers. I think it really increases my need to create and share."[12]
— Female, 35–44 years old

12. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

13. New York Times/Customer Insight Group. (2011). *The Psychology of Sharing: Why Do People Share Online?*

14. Simmons. (2011 SUMMER). *NHCS Adult Survey 12-Month*

USER HABITS AND USAGE OF THE SOCIAL WEB

The personality and values expressed within each of the four personas reveals a unique angle on why they use the social web. Through qualitative research we dove further into what motivates each of them to use the social web, their habits and usage and how they engage with brands using this platform.

Facebook is the top social networking site for all four personas, with nearly all respondents having used Facebook within the past week. Creators participate in Twitter the most (49%), and Professionals are most likely to use career-oriented networking sites such as LinkedIn (25%). In addition, all personas are quite active across a wide variety of online activities such as blogging, watching videos, researching/purchasing products, gaming, looking for or downloading coupons, uploading and viewing pictures and reading the news.[15,16]

On a typical day, Bonders and Sharers use multiple social networking sites to stay in touch with their family and friends. As one Bonder said, "I use Facebook almost daily. My husband is in the military, so it is a great way to keep in touch with my family and friends all over the states. I only use it to post pictures, read about others and what they are doing and messaging."[15] Alternatively, many Creators enjoy reaching out to their audience daily with personal 'creations': "I'm an artist, so I love how easy it is to share content or images on social networks."[15] And though relationships are a core motivator to all personas, Professionals primarily look to receive the most up-to-the-minute news from the social web: "I love that I can keep up to date with everything that is going on…I'm not by a TV or radio most of the day, so if there is something important going on, I usually use Twitter to find out." [15]

> Facebook is a universal tool for all social networkers, regardless of motivation.[15]

15. Integer/iModerate. (2011, NOVEMBER 7).
    Social Networking and Brand Engagement Research

16. Simmons. (2011 SUMMER).
    NHCS Adult Survey 12-Month

The first daily check-in to the social web is primarily a morning activity, with approximately 75% of Creators, Bonders and Sharers and 66% of Professionals checking in before mid-morning. And most check-in frequently throughout the day: "First thing in the morning, lunchtime at work and a couple times during the evening after dinner," is how one Creator put it. A Sharer stated that she starts her day "with a cup of coffee and my laptop in hand every morning at 7 a.m., EST." [17]

The length of time spent on social networking sites daily varies among the groups, with Professionals spending the least (53% spent less than an hour daily) and Creators leading the pack, with 33% spending three or more hours a day engaged on social networking sites.[17]

Mobile phones are used less frequently than computers by all groups, with approximately 66% of Creators, Professionals and Bonders using their mobile phones to connect to the social web some of the time. Only 33% of Sharers use their mobile phones to do so. The main motivation for everyone to connect via their phones is because they can be used anywhere, anytime.[17]

Length of Time Using Social Networking Sites Daily [17]

Creators
Every other day or so	8%
Less than an hour	16%
1–2 hours	43%
3–4 hours	33%

Bonders
Every other day or so	0%
Less than an hour	28%
1–2 hours	47%
3–4 hours	25%

Professionals
Every other day or so	18%
Less than an hour	35%
1–2 hours	28%
3–4 hours	20%

Sharers
Every other day or so	7%
Less than an hour	31%
1–2 hours	40%
3–4 hours	23%
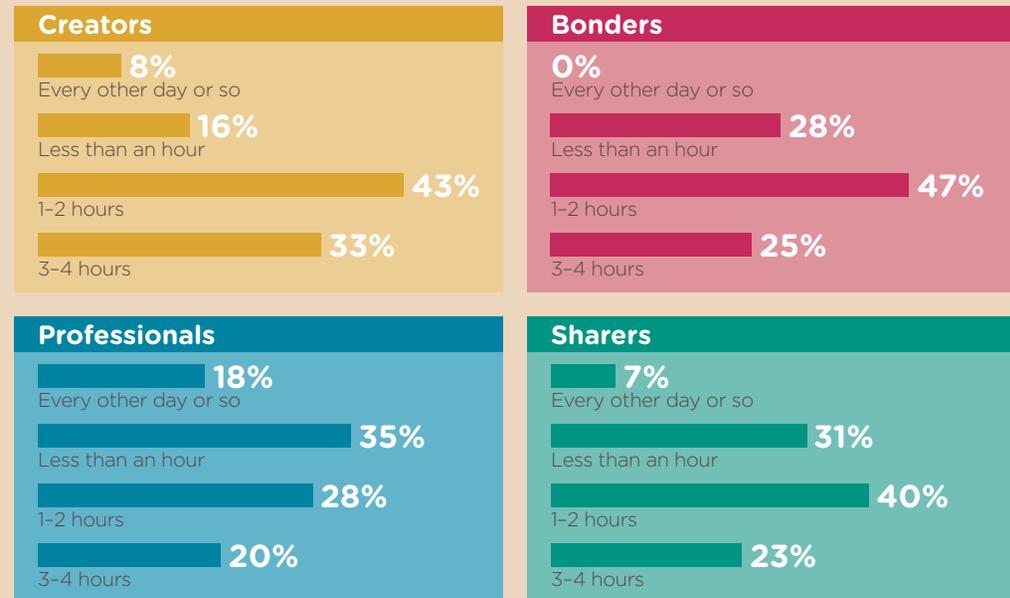
Professionals spend the least amount of time on social networks daily due to their on-the-go lifestyles.

17. Integer/iModerate. (2011, NOVEMBER 7).
Social Networking and Brand Engagement Research

USER MOTIVATIONS AND CONCERNS OF THE SOCIAL WEB

The main differentiator between the groups is not what they do via social networking as much as why and how they use these applications. Each persona has unique factors that motivate them to engage via social networking.

In our qualitative conversations with respondents, we asked what they get out of social networking that is not available elsewhere. All four groups spoke of a sense of connectedness. Their perception is that the social web improved their ability to stay in touch with those living near and far. This goes back to our innate desire to connect to others using whatever tools are available to us. Connection and communication are the key motivators; however, each group has differences about how and why they connect.[19]

Bonders and Sharers use social media to stay in touch with family and friends, and fostering these relationships is of primary importance to their daily routine. In particular, many Bonders' days involve frequent check-ins with family and friends. As one Bonder stated, "Facebook is sort of my 'window to the world' as a stay-at-home mom...It's pretty hard to connect with people in person with three kids and all of life's activities, so Facebook helps us all stay in touch and see what's going on in each other's lives."[18]

Creators see their typical day as consisting of staying connected to family and friends as well as posting unique content on social networking sites. "[I use social networking for] reading and writing... I search for new ideas from people and try to get my ideas out there for people to read or comment on."[18]

Professionals see social networking usage as a way to keep up to date on current events and news, as well as work-related queries: "I check my news feed to see what everyone is up to. I'll also check my business page to see if anyone needs questions answered," stated one busy Professional.[18]

> The main differentiator between the user groups is not what they do via social networking—they all use Facebook— it's why and how they use these applications.

18. Integer/iModerate. (2011, November 7). *Social Networking and Brand Engagement Research*

19. Integer/Qualvu®. (2011, December). *Social Networking Habits Related to Shopping*

All four personas also think that the ease of accessing information via social networking could not be paralleled elsewhere. They appreciate the instant and immediate access to news and information.

> "I'm constantly updated on everyone at once. I wouldn't be able to do that without Facebook. That's the only thing social media does for me that nothing else can," said one Bonder.

Learning what long-lost friends are up to and keeping in touch with family across the country as well as the ease of access to pictures, videos and other media that express people's thoughts would otherwise be much less accessible due to distance.[21]

The plethora of information that social networking has made readily available has also posed some threats for people. The biggest concern across all personas is the general privacy of their personal information. Fifty-one percent of Bonders are concerned about general privacy, and 20% are concerned that they would not be able to "take down" embarrassing content posted about them. Twenty-three percent of Professionals are concerned that their employer or coworkers would be able to access their "private" information and content. Sharers are the biggest group to express no concern for privacy (36%).[20]

Concern for Privacy[20]

All personas view general privacy as the largest threat associated with social media.

51% of **Bonders** are concerned about general privacy on the social web despite their reliance on it to connect

36% of **Sharers** express no concern for privacy on the social web, making them the least worried of all personas

Social networkers feel the ease of accessing information via social networking is unparalleled.[21]

20. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

21. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

SOCIAL NETWORKING AND ENGAGING WITH BRANDS

Engaging with brands on the social web has become a commonplace activity, with 42% of U.S. adults following a retailer or brand via Facebook, Twitter or a blog.[24] This two-way communication has become an expected component of a brand's communication strategy. Consumers appreciate being heard by retailers or brands they follow. As one Bonder expressed, "I had just bought a brand-new pair of Vans shoes, and I was looking to see if they had a Facebook [page]. I found out they did, and gave some feedback on how awesome and comfortable these shoes were. I shortly received a thank-you message in my inbox from whoever on the Vans Facebook page thanking me."[23] People feel more connected to the companies that provide a more direct line of communication through the social web, either with the company directly or other people who are interested in its products or services. In some cases, the online experience can surpass that of the brick-and-mortar retail environment—"On different retailers' Facebook pages, I have been able to ask questions about products found online or about returning a product. [I asked] the Bath and Body Works one specifically about needing to exchange something—I got a more positive response on Facebook than I did when I tried in the store."[22]

The primary reason all personas engage with retailers and brands on social networking sites is to "get perks."[22] Some key retailers and brands that respondents specifically mentioned interacting with include CPG products (Tide®, Nabisco® and GoGo Squeez™), big box stores (Target® and Walmart®), retail pharmacy CVS®, retail clothing stores (Old Navy®, Charlotte Russe®), electronics company LG® and quick-service restaurant Subway®.[23] The instantaneous nature of finding special offers makes this avenue very appealing: "When I joined up with Subway, I was able to know when specials and deals were happening sooner than I saw them on the television."[22] It gives consumers a proactive way to seek specials and promotions on their own time.

In addition to perks, some respondents—Bonders in particular—'like' retailers and brands as a way of sharing information. "Every time I see a brand I like, I will 'like' it so that I get feeds from them and I like others to see it so they can check it out! I write reviews on almost everything. I actually wrote one today about Nutella®! If it's good, I want all of my friends to know about it."[22] This sense of enthusiasm is amplified through the sharing and circulating of people's comments, and it can help retailers and brands remain top of mind among their shopper base.

> ## 42%
>
> of U.S. adults follow a retailer or brand via Facebook, Twitter or a blog. This two-way communication via the social web has become expected.[24]

22. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research*

23. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

24. Useful Social Media. (2011). *Social Commerce: Important Dates*. Retrieved from http://digitalcpg.com/2011/12/infographic-history- of-social-commerce/

Sharers are essentially endorsers of brands and retailers. They particularly 'like' brands and retailers because they want to spread the word about brands they like and help their friends find these brands. As one Sharer said, "It made me feel good that I'm promoting their brand and possibly helping them [the brand]."[25] A sense of community is also a benefit for Sharers; "I enjoy promoting any business that is trying to improve the nation's health [Livestrong®]. I felt good because I felt like I was part of a movement to help those battling cancer. I would describe it as being able to be a part of a group or fan club but electronically."[25]

When it comes to brand categories, Sharers (54%) and Bonders (41%) engage most with Food/Grocery brands, while Creators (36%) and Professionals (36%) tend to engage most with Electronics/Technology brands.[25]

Within these categories, people use the social web to get advice about products and brands from other people in their networks or from existing posted reviews.

When considering her grocery shopping, one Bonder stated, "I check out the page of the 'Krazy Coupon Lady' and the 'My Frugal Adventures' page to see where the good deals are and sometimes check the discussions tab. I have traded coupons with some of the women too." Using social networking in this way makes them feel like a "smart shopper."[25]

> Using social networking to seek out deals and input from friends makes them feel like a "smart shopper."[25]

Brand Categories That Social Shoppers Engage With Most[25]

Electronics/Technology
- Creators: 36%
- Professionals: 36%
- Bonders: 31%
- Sharers: 21%

Fashion/Apparel
- Creators: 28%
- Professionals: 7%
- Bonders: 18%
- Sharers: 10%

Food/Grocery
- Creators: 28%
- Professionals: 29%
- Bonders: 41%
- Sharers: 64%

Restaurant/Service Providers
- Creators: 9%
- Professionals: 23%
- Bonders: 10%
- Sharers: 10%

Legend:
- Creators
- Professionals
- Bonders
- Sharers

Sharers and Bonders are focused on personal relevant connections online. They are more apt to connect with "everyday" food and grocery brands rather than less relevant "latest and greatest" fashion or technology.

25. Integer/iModerate. (2011, November 7). *Social Networking and Brand Engagement Research*

SOCIAL NETWORKING AND SHOPPING

Social web shopping goes well beyond simply buying on Amazon®. It extends into every aspect of a shopper's purchase cycle, ultimately affecting their decision-making process. Shoppers in the real and virtual world use the social web to help gain insights, make decisions and report back on their experiences with retailers and brands. The extent of this activity will likely surprise many businesses and is a key reason so much attention must be paid to this new arena.

Online shopping has become a daily activity, with 53% of medium to heavy social media users having made a purchase online within the past week. In addition, 58% say they've researched a product online that they planned to buy.[26] This indicates that the digital space, including the social web, has become a viable resource for people to use throughout their shopping journey. This journey can be illustrated using Integer's Shopper Continuum® framework, which is comprised of three distinct phases of shopping behavior: Pre-Tail®, Retail and Post-Tail®. Pre-Tail® is comprised of the activities taken in preparation to shop, such as the seeking and selection of a product and/or retailer. Retail comprises those activities that take place in a real or virtual retail environment, and Post-Tail®

encompasses those activities that retailers and brands can undertake to reinforce the purchase(s) made and that celebrate and encourage shoppers to repeat their behavior over and over again, creating loyalty and advocacy.

The Shopper Continuum® is a framework for thinkng about the shopper journey: before, during and after purchase.
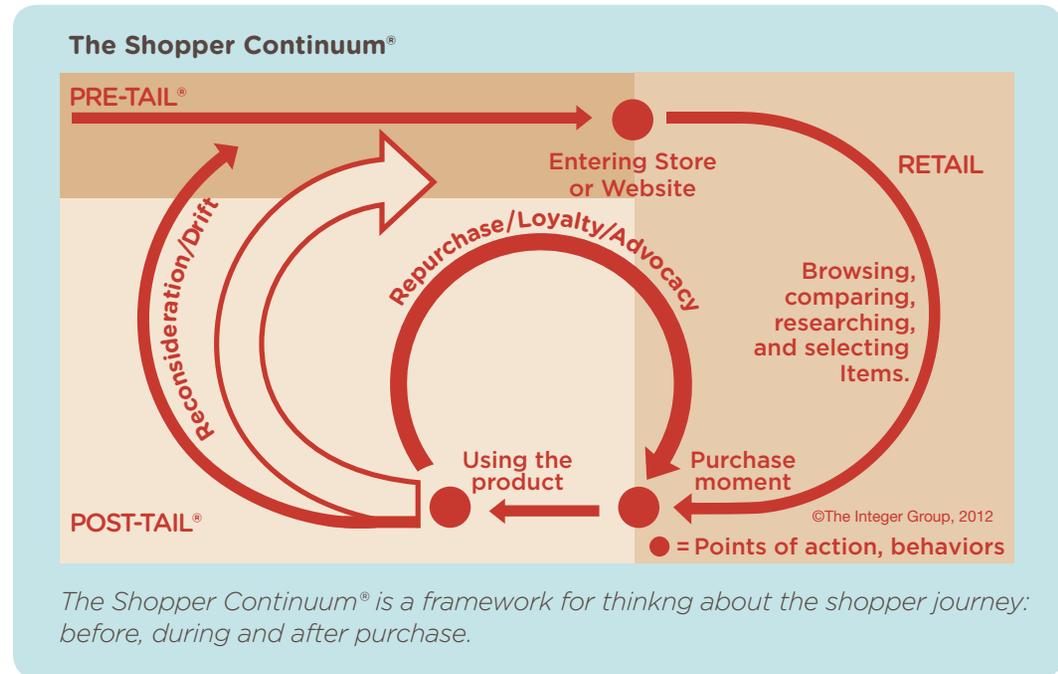
26. Integer/iModerate. (2011, November 7). *Social Networking and Brand Engagement Research*

In our research, we dove into the shopping journey in more detail to uncover how, when, where and why consumers use the social web throughout the purchase cycle. By understanding shoppers through their firsthand experiences, we uncovered rich insights in terms of how social networking usage is woven throughout the purchase cycle.

We found that the Pre-Tail® phase is when the most social networking activity tends to happen. This is due to the amount of time spent researching options, gathering information and making decisions. All this is often done before deciding what to buy and where to buy it. A lot of time and thought is put into this stage to ensure that shoppers are getting the best price and quality. During the Retail phase (in store or on a website) and Post-Tail® phase (after purchase), social networking activity tends to be more streamlined because the bulk of research and decision-making has already been done. However, one person's Post-Tail® activity becomes another's Pre-Tail® influence, creating a continuous and self-propagating feedback loop.[27]

Pre-Tail®: Before the Store

During the Pre-Tail® phase of shopping, social networkers primarily use the social web for three purposes: discovery, deals and research.[27]

> The most social networking shopping activity tends to happen during the Pre-Tail® phase.[27]

Pre-Tail® Use of Social Media for Shopping [27]

The social web helps shoppers discover something new, find deals and research something of interest before they buy.

27. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

1. DISCOVERY

Discovery is all about unearthing new ideas on what to buy. A user's social networks are built on friends who have similar interests, tastes and styles and who post about brands they like, restaurants they've frequented or music they're listening to. Often a friend's post will trigger ideas for things to explore. "The unexpected comes from Facebook. Because those things [posts] are on my wall and I see them daily."[28] What people end up buying is often not what they've been actively searching for. Posts by friends help them discover new, better options for everything from cameras to toilet paper. "Someone in my group of friends posted 'what kind of toilet paper does everyone like to use?' and when I got the feedback from the group that said what they use and why they like it, it made me think well I should try that brand because my toilet paper doesn't do that. So it's not always things I'm actively searching for."[28]

By following retailers and brands on Facebook and Twitter, shoppers stay up to date on the latest product releases, fashions and trends. Bonders and Creators tend to be more discovery-focused. Bonders revel in connecting with others by asking for ideas. Deals are especially attractive if they are for something that could be done with a friend, such as a

Groupon® for dinner or a LivingSocial® activity. Creators like to keep up with the latest trends and view deals and promotions as a way to try new things or retailers. One Creator shared, "A coupon enticed me; it wasn't a planned purchase. If that special offer wasn't up, I wouldn't have even gone to that store."[28]

Discovery also drives impulse purchase and trial. "Somebody 'liked' Panera® on Facebook and that sounded so good for lunch—it triggered an impulse buy that I hadn't thought about...because we were trying to figure out what to do for lunch and that just popped up," shared a Bonder.[28] Discovery promotes idea generation, and some consumers are drawn to primarily use social networking for this purpose of unearthing new products, services and retailers to try.

> The unexpected comes from Facebook, through daily wall posts from brands, retailers or friends. What people end up buying is often not what they've been actively searching for.[28]

28. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

2. RESEARCH

Shoppers research various sites online and consult the opinions of friends and family to make informed purchase decisions. Searching online has become second nature for consumers, and this expertise gets applied to shopping. Social networks are used to research products, prices and retailers to help shoppers decide what to buy and where to buy it before they head to the store. A high value is placed on advice from their networks, and all personas said they use social networking to "do their homework" by researching products, prices and retailers. As one Bonder said, "Every time I do ask for someone's opinion, that opinion is going to be pretty determinant on how I purchase things. If a friend tells me X product is good, chances are I'm gonna go with X product." Others, however, are content to go with the recommendations of perfect strangers on the social web. "A lot of information social networking sites provide me with, my friends might not be aware of. Social networks probably inform 40%–50% of my purchases every year."[29]

Shoppers consult multiple resources before making a decision on a product or retailer. These include social networks, forums, blogs and retailer websites. As one

Bonder said, "I use a variety of resources to get the best… not just price, but in terms of quality too." Amazon came up as the top source for product reviews, and many use it as a starting point for their research. This site proves valuable to shoppers because it offers the widest variety of products, the greatest number of user reviews and a clear star-rating system. Facebook and Twitter are used to get direct suggestions from friends and family. "I trust [my friend] because he wasn't trying to sell me something, but instead give me information based on his experience."[30] Other sites used include Yelp® and Citysearch® (the go-to options for local businesses), and Froogle (Google's price search engine, on which shoppers can sort by price and location among thousands of retailers). In addition, specific communities such as "mommy forums" are often created to receive ongoing advice. "If I need a recommendation on what car seat to buy or which formula to go with, I ask my online community. It's very informative because people have already tried these things."[29]

And what about retailer selection? Shoppers do due diligence prior to going into a store. Using social networking is how "I become familiar with the brand,"

Searching online has become second nature for consumers, and this expertise gets applied to shopping.

29. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

30. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research.*

as one Professional shared. Once they're decided on a product, some use their favorite retailer's website as the starting point for their product search. Others will search for the best price using Google®, go to a competitor's website, check the retailer's Facebook page for available coupons/promo codes or go directly to coupon websites. Retailer selection seemed to be driven by a combination of available promotions and also tapping in to their network of friends to see where they can find the product they want at the best deal.[31]

3. DEALS

Finding discounts, coupons and promotions is a prime driver for engaging with retailers and brands on the social web. Facebook is often "home base" for searching and sharing deals. Most retailers and brands can be found on Facebook, and when a consumer "likes" a brand, the brand's posts show up right in the user's feed, continuously keeping them top of mind. A lot of blogs and coupon sites often direct users back to Facebook as well.[31]

Good deals often motivate impulse purchases and new product trial. When an enticing offer shows up on their Facebook newsfeed, it only takes one click to reach the

retailer's website. In fact, 28% of Facebook users have purchased something via a Facebook link.[32] Sharers tend to be the most coupon-focused and look beyond Facebook to coupon blogs and more to find deals. They also tap in to an array of "experts," from friends to bloggers to research, and learn about new items and decide on retailers. "Anytime before I buy or do anything, I need to search for a coupon" quoted one Sharer. One Professional stated, "I look for deals on a weekly basis. Seventy to eighty percent of the time it is for food and grocery. The remaining 20% is probably for restaurants."[33]

If an attractive coupon or deal shows up in their news feeds, people quickly switch from their "social network browser" (consumer) to "shopper" mind-set. Such deals motivate them to click through to the retailer's website to take advantage or print the coupon for a trip to the store.

28%

of Facebook users have purchased something via a Facebook link.[32]

31. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

32. Useful Social Media. (2011). *Social Commerce: Important Dates*. Retrieved from http://digitalcpg.com/2011/12/infographic-history- of-social-commerce/

33. Integer/iModerate. (2011, NOVEMBER 7). *Social Networking and Brand Engagement Research.*

Retail: In-Store
Social Networking Behavior

While the majority of social web activity is conducted before the shopper steps foot in the store, some will continue to research on the fly, share deals and communicate with their network via their mobile phone. Forty-seven percent of consumers report using their mobile device in store to access product information.[34] The savvy mobile shopper will tell you there's certain criteria that goes into product reviews they seek, and not just any will do:

> "There must be more than one review posted, and it can't be cookie-cutter."[35]

Some thought and personal experience must go into the review to make it believable and genuine; otherwise, it's tossed out.

Google offers shoppers simple ways to research on the fly via their online product reviews and price checks. Froogle.com is a price-comparison service launched by Google that shoppers often consult before making a final purchase decision. Purchasing via a social networking site like Facebook is already here, and Twitter might not be far behind. Thirty-five percent of shoppers say they would buy a product off of Facebook, and 32% would do so from Twitter if possible.[34]

Having a network at their fingertips allows shoppers to make more informed decisions. Shoppers will often text or instant-message their friends to inquire about their opinions on prices or product quality. "Contacting a friend allows me to make a wise decision and not just jump into a purchase," stated a Creator. Posting a question to Twitter or Facebook to gather suggestions and opinions from one's network is often done in situations where less immediate feedback is needed. Often this is done for less urgent purchase items such as music or clothing. "Sampling on the go" can also be done using location-based social media apps, such as foursquare. Shoppers can look for last-minute deals that might be available locally.[35]

35%
of shoppers say they would buy a product off of Facebook.[34]

34. Useful Social Media. (2011). *Social Commerce: Important Dates*. Retrieved from http://digitalcpg.com/2011/12/infographic-history- of-social-commerce/

35. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

Sharing deals is also an important part of the cycle; if a shopper stumbles on a great find that's too good to resist, they will post it real-time for their network to absorb and repost. For example, one Sharer reported posting to Twitter a special on wine at the local convenience store. The post was then picked up by friends and re-tweeted.[36] This is one example that demonstrates why more shoppers are using their mobile phones while browsing stores.

> The social web and technology together allow more people to be part of every shopping trip.

Post-Tail®: Post-Purchase Social Networking Behavior

The primary motivator for shoppers post-purchase is to continue spreading the word throughout their networks and to participate in loyalty programs. Consumers naturally share their daily thoughts and experiences with their social networks, including mention of purchases they've made, brand and retailer preferences and deal discoveries. Sharers are particularly active during Post-Tail® because it's of primary importance to them to contribute knowledge and relevant information with their network. They are the most apt to comment or post a review on the latest and greatest product they purchased. One Sharer commented, "If I'm really passionate about something, I will recommend it over and over and over again to everybody. And I'll post it all over Facebook."[36] They'll also send recommendations or deals directly to friends by posting on their wall, sending a Facebook message or sending email. They circulate Groupon and LivingSocial deals most frequently. They'll also actively comment on posts friends have made asking for future purchase advice.

> "If I'm really passionate about something, I will recommend it over and over and over again to everybody. And I'll post it all over Facebook."[36]

36. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

Writing user reviews to sites such as Yelp, CitySearch and Amazon are also part of the sharing process. Positive experiences with a brand or retailer garner 'likes' to their Facebook pages after purchase. Consumers tend to 'like' a brand or retailer on Facebook to stay informed about news/products/changes, to demonstrate fondness for the brand or to express themselves to others. Creators are very active during Post-Tail® because it's when they can "advertise" themselves by showing what they bought and what brands they like. "When you're on a social network, one of the reasons you're there is to show who you are… for Facebook, when you 'like' something, it shows what is a part of you."[37]

Many respondents expressed feeling loyalty to the retailers and/or brands they've 'liked' on Facebook. In some cases, their preexisting fondness for the retailer and/or brand motivated the 'like.' As one Sharer commented, "Do I consider myself more loyal to them? Yeah. Because I'm not going to 'like' them on my Facebook, or share them with my other social networking groups, unless I actually am loyal to them and believe in their service or in the product."[37]

Social networking is used during all phases of the shopping journey, but the process is rarely linear. The diagram on page 22 illustrates an example of a young mom's shopping journey to decide which brand of diapers to buy and where to purchase them.

This scenario is a common one; once the shopper knows which product to buy it is time to decide which specific brand they will buy and then which retailer they will visit to make their purchase. Not all shoppers will complete every step that's illustrated along this journey; rather, it's more of a random process where social networking is tapped in to at various stages. One can 'like' a brand on Facebook in the Pre-Tail® phase to obtain a coupon or more information from a retailer to decide if they want to shop there, or they might 'like' a retailer in the Post-Tail® phase to show their support for that retailer and spread the word that this is a great place to shop. Regardless of how and when a shopper connects via social networking, there is an overall appreciation for a brand's/retailer's efforts in connecting with them. Offering deals tends to also increase loyalty, giving shoppers a reason to come back for more.

"I'm not going to 'like' [a brand or retailer] on my Facebook, or share them with my other social networking groups unless I actually am loyal to them and believe in their service or in the product."[37]

37. Integer/Qualvu. (2011, December). *Social Networking Habits Related to Shopping*

Shopping and the Social Web[38]

Social networking is intimately woven throughout all phases of the shopping journey. This is an example of one such journey.

PRE-TAIL®

Post to wall asking fellow moms in her network for suggestions

Browse retailer sites and read user reviews

Ask fellow moms where they purchase their diapers

Search news feed for deals and coupons

Conduct price search on Google.

Brand Selection →

RETAIL

'Like' retailer to try to find a promo code

Search coupon sites for promo codes

Retailer Selected →

Use a barcode scanner app to look up last–minute reviews or price-compare

Tweet about a great deal she found in store

Enter Store or Website →

POST-TAIL®

'Like' brand to stay updated on new products

'Like' retailer for future deals

Post review of diapers and retailer site

Purchase Made and Product Used →

38. Integer/Qualvu. (2011, DECEMBER). *Social Networking Habits Related to Shopping*

When considering how to best communicate with shoppers via social networking, it is imperative to keep a few things in mind:[39]

GIVE USERS A REASON TO 'LIKE' YOUR BRAND

- *When respondents 'like' a brand on Facebook, they expect something in return, such as a gesture of appreciation or some reciprocation for their 'like.' Offer a coupon, promotional code (e.g., free shipping, percentage discount, etc.) or other perk to those who 'like' your brand.*

BE SUBTLE AND PERSONAL WITH MESSAGING

- *When a user 'likes' a brand, that brand's posts show up in the user's news feed, intermingling with posts from family and friends. Of course, users understand that they will receive some kind of marketing messages when they 'like' a brand, but they don't want to be "sold to" in this space. Messages should have a personal feel. Subtlety is important.*

ALLOW EASY DEAL SHARING ON FACEBOOK AND TWITTER

- *Respondents enjoy sharing deals with friends. By allowing followers to easily share deals, the brand will receive greater exposure. It could be beneficial to offer followers an incentive for sharing deals, such as an extra coupon or points added to their store rewards card. This would increase sharing behavior.*

ENGAGE WITH COUPON SITES

- *Many use coupon sites and follow coupon-related blogs. By offering coupons directly to these sites, exposure will increase. This is especially relevant for CPG brands and grocery retailers. Respondents love daily deals from Groupon and LivingSocial. Also, these types of deals are shared frequently.*

STICK WITH IT

- *Once a brand decides to engage social network users, they should stick with it. If deals and informational posts become too sparse, it could hurt brand image. As one shopper said, "It seems like some of these companies do it [offer coupons to followers] as a gimmicky kind of thing just because everyone's doing it, and then they just forget about it. They need to stay with it."*

39. Integer/Qualvu. (2011, December). *Social Networking Habits Related to Shopping*

BUSINESS CONSIDERATIONS

Though understanding the various consumers and shoppers you encounter as a retailer is important, there are other considerations as well.

So start asking yourself:

+ *Do you understand which persona your shoppers fall within?*

+ *Do you understand how and where you can enhance their social and in store experiences?*

+ *Do you have a way of engaging effectively with these personas?*

In the rapidly evolving world of social networking, addressing these questions grows increasingly important with each passing day.

Notes:

UNTANGLING THE SOCIAL WEB:
INSIGHTS FOR USERS, BRANDS AND RETAILERS

PART 3 OF 5: **APPENDIX, SOCIAL NETWORKING PERSONAS**

Social Consumer:

THE BONDER

High School Persona: The Social Butterfly
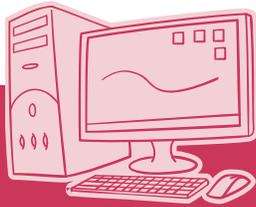
> *"It has brought [people] back to my life. I have found old teachers, old friends, connected with lost relatives. I am sure this would not have happened without Facebook."* —FEMALE, 35-44

AGE: <40 **GENDER:** Skews female **EMPLOYMENT:** 63% are employed full or part time

WHO AM I?

+ The most valuable possession I have is the people in my life. I am a sociable, people person, and I look for any excuse to get involved with a group, host friends at my house or sit down with the family. I am not afraid to be impulsive and try something new, either, because it allows me to make new connections.

+ I like to connect with others to hear what's going on in their lives and share my thoughts and ideas. Sometimes I even introduce people who I think might get along.

MY SOCIAL NETWORKING PERSONALITY

I find myself to be both introverted and extroverted online, depending on what I am doing or who I am connecting with, and I do not expect that to change moving forward.

ONLINE, I THINK I AM...	BUT I FEEL THAT OTHERS SEE ME AS...
Fun, sociable, connected (75%)	Helpful, genuine (46%)
Kind, helpful, sincere (11%)	Hip, cool, popular (30%)
Other (14%)	Other (24%)

MY DAILY SOCIAL NETWORKING ACTIVITIES

updates The social web has changed the way I connect. It is there first thing in the morning with updates on my entire network, new posts and videos from my favorite bloggers and an alert that it's my turn on Words With Friends.™

I often hop online when I wake up and am active throughout the day. I spend most of my time on Facebook®, checking in and keeping tabs on friends and family so I can continue to maintain and build solid relationships. Sometimes I even come across some old friends and reconnect. When I am not at my computer, I often get on my phone's Facebook app so I don't miss a thing.

Like Though staying connected is the best part about social networking, I definitely make the most of everything it has to offer. It is entertaining, informative and resourceful. I am able to upload photos, watch videos and get input or advice from others on a variety of topics.

PRIMARY SOCIAL NETWORKING ACTIVITY

62%	OBSERVE/ABSORB CONTENT
22%	POST/CONTRIBUTE MY OWN ORIGINAL CONTENT
13%	SHARE/COMMENT ON CONTENT I FIND THAT BENEFITS OTHERS
3%	SEARCH FOR INFORMATION I NEED

% OF RESPONDENTS QUESTION: WHAT ACTIVITY DO YOU PARTAKE IN MOST OFTEN ON SOCIAL NETWORKING SITES? (N=40)

WHAT DRIVES MY SOCIAL NETWORKING HABITS?

- Create/cultivate relationships — 57%
- Sharing/spreading relevant and important info with people — 32%
- Other — 11%

Social Shopper:

THE BONDER

High School Persona: The Social Butterfly

> "I had just bought a brand new pair of Vans shoes, and I was looking to see if they have a Facebook page. Well I found out they did, 'liked' them, then gave some feedback on how awesome these shoes are and how comfortable they were. I shortly received a thank you message in my inbox from whoever on the Vans Facebook page thanking me."
>
> —MALE, 18–24

MY SOCIAL-SHOPPING MIND-SET: I like that I can have a relationship with my favorite brand(s) and retailer(s) on the social web and that it will also help me be an efficient and smart shopper.

THE SHOPPER CONTINUUM®

PRE-TAIL®

Entering Store or Website

RETAIL

Using the Product

Purchase Moment

POST-TAIL®

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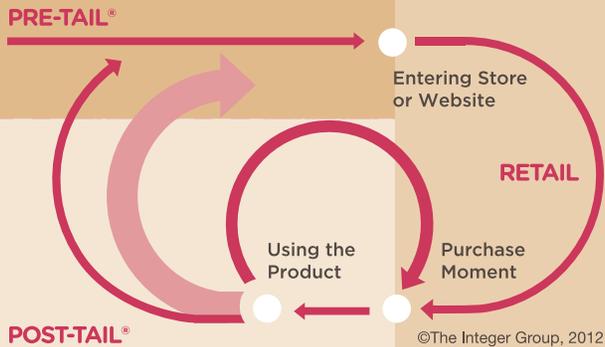
RETAIL—Store-Based Explorer

I shop often and think it's fun to explore new stores and products. In store, I do not consult with my network as much. I like to learn about products using what's in store but will check my smartphone if necessary. I am impulsive, especially when I am able to easily find a bargain.

POINTS OF ENGAGEMENT:

EXPERIENTIAL INFORMATION: signs, displays, mobile
VALUE PLUS: coupon machines, circulars, end-of-aisle promos, bundles

---

PRE-TAIL®—Genuine Information Seeker

I like to plan my purchases using genuine, helpful information. I connect with my network, talk to friends, read and review brand posts/websites and take note of advertising/FSIs. I have joined sites like Groupon® and friended my favorite brands to get deals.

POINTS OF ENGAGEMENT:

CONNECTION POINTS: Facebook® pages, social networks
INFORMATIVE OUTLETS: websites, FSIs, advertising

POST-TAIL®—Connect and Share

I like to share meaningful experiences with my network and connect with brands or retailers so I can continue to discover new things, find coupons and plan ahead.

POINTS OF ENGAGEMENT:

VALUE PLUS: coupons, rebates, rewards
PERSONAL ENGAGEMENT: brand pages, social network, mobile communication

---

WHY SOCIAL-NETWORK WITH BRANDS?

67%	TO GET PERKS
15%	TO ADVISE MY NETWORK
9%	TO SHOW SUPPORT/ SHOW OTHERS WHAT I LIKE
9%	TO GIVE FEEDBACK

% OF RESPONDENTS QUESTION: WHAT IS YOUR PRIMARY REASON FOR ENGAGING WITH THE BRANDS YOU DO? (N=31)

TYPES OF BUSINESSES I ENGAGE WITH ONLINE

41%	FOOD & GROCERY
31%	ELECTRONICS/ TECHNOLOGY
18%	FASHION/ APPAREL
9%	RESTAURANTS/ SERVICE PROVIDERS
1%	OTHER

% OF RESPONDENTS QUESTION: WHAT TYPE OF BRANDS DO YOU ENGAGE WITH MOST? (N=31)

Making Connections

IMPULSIVE FUN SOCIABLE Share

Social Consumer:

THE SHARER

High School Persona: The School Journalist
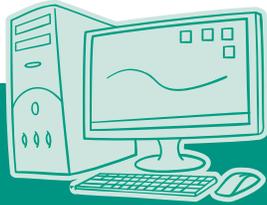
> "I periodically check on the recent posts and will often interact with friends through comments. If I happen to have pictures that day, I may upload them; if not, then I will just interact [with friends]."
> —MALE, 25–34

AGE: >40   **GENDER:** Skews female   **EMPLOYMENT:** 49% are employed full or part time

WHO AM I?

+ I love to learn new things and keep a finger on the pulse of the people and world around me. More important, I love to share my discoveries in hopes that they will help the people in my life.

+ I think people see me as a good source of genuine, helpful information. Sharing and helping others also lets me build connections and stronger relationships.

MY SOCIAL NETWORKING PERSONALITY

I am extroverted online when it comes to sharing pertinent information but tend to keep certain things to myself.

ONLINE, I THINK I AM…	BUT I FEEL THAT OTHERS SEE ME AS…
Kind, helpful, sincere (48%)	Helpful, genuine (76%)
Fun, sociable, connected (29%)	In the know, up on the latest news (10%)
Other (23%)	Other (14%)

PRIMARY SOCIAL NETWORKING ACTIVITY

42% SHARE/COMMENT ON CONTENT I FIND THAT BENEFITS OTHERS

28% OBSERVE/ABSORB CONTENT

23% POST/CONTRIBUTE MY OWN ORIGINAL CONTENT

7% SEARCH FOR INFORMATION I NEED

% OF RESPONDENTS   QUESTION: WHAT ACTIVITY DO YOU PARTAKE IN MOST OFTEN ON SOCIAL NETWORKING SITES? (N=40)

WHAT DRIVES MY SOCIAL NETWORKING HABITS?

- Sharing/spreading relevant and important info with people — 82%
- Create/cultivate relationships — 13%
- Other — 5%
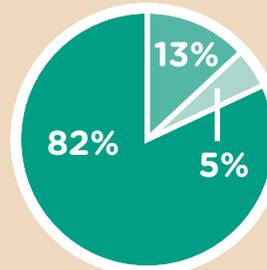
MY DAILY SOCIAL NETWORKING ACTIVITIES

advice The web has really changed the way I spend my time, get information and give advice. It offers up-to-the-minute information on news, family and friends all in one place, and it's always updating.

I get up in the morning and check-in online first thing to post something I came across the night before or contribute to the conversation that sprang up from a friend's post. I'd rather browse the social web on my laptop than fumble around on my mobile phone's app. I want to take my time to read, reflect and then share the most helpful nuggets of information.

I spend most of my time on Facebook because it allows me to share and connect with the people in my life at the same time. However, I also like to explore blogs, discussion boards and other sites to learn new things so that I can help the people I care about.

Social Shopper:

THE SHARER

High School Persona:
The School Journalist

> "I enjoy promoting any business that is trying to improve the nation's health. I felt good [to interact with the Livestrong® brand] because I felt like I was part of a movement to help those battling cancer. I would describe it as being able to be part of a group or fan club but electronically."
> —MALE, 25–34

MY SOCIAL-SHOPPING MIND-SET: Connecting with brands and retailers in the social web gives me a lot of information, which eases my shopping process by helping me make better decisions and be more informed about sharing with others I care about.

THE SHOPPER CONTINUUM®

PRE-TAIL®

Entering Store or Website

RETAIL

Using the Product

Purchase Moment

POST-TAIL®

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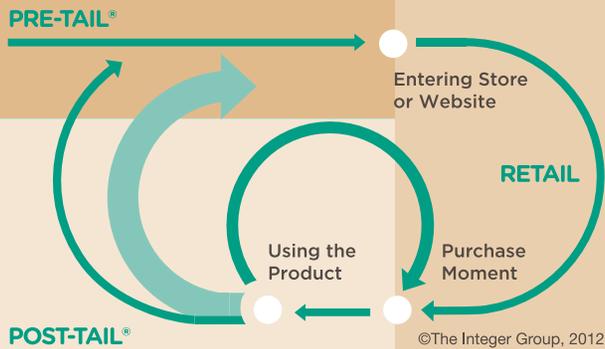
RETAIL—Bargain Hunter

Online shopping is easy, convenient and always seems to be a bargain. I get all the information I need to make decisions online and can immediately share my findings. But, I also shop at retail, especially stores with sales or events. In store, I use their information to navigate and make decisions and look for bargains rather than my network.

POINTS OF ENGAGEMENT:
SUPER SAVINGS: coupon machines, circulars, bundles, end-of-aisle promos, specials, features

PRE-TAIL®—Attention to Detail

I like to be prepared to shop. I go online, check Facebook® for offers/promos, comb the newspaper FSIs and ask for retailer suggestions. I consult with both friends and experts, and I like to find a coupon for something that I have been wanting to try.

POINTS OF ENGAGEMENT:
CONTENT-RICH AREA: sponsored websites, links, social networks, blogs
ADVICE: social network, FSIs

POST-TAIL®—Report Back

I like to share my shopping experiences with my network because I want to help them have the best experience, find the best deal or make the best decision. I also connect with brands to share my thoughts and get coupons or perks.

POINTS OF ENGAGEMENT:
CONNECTION POINTS: social networks, brand pages, mobile communication, peer word of mouth
SAVINGS: rebates, rewards, coupons, etc.

WHY SOCIAL-NETWORK WITH BRANDS?

%	
73%	TO GET PERKS
14%	TO SHOW SUPPORT/ SHOW OTHERS WHAT I LIKE
8%	TO GIVE FEEDBACK
6%	TO ADVISE MY NETWORK

% OF RESPONDENTS — QUESTION: WHAT IS YOUR PRIMARY REASON FOR ENGAGING WITH THE BRANDS YOU DO? (N=31)

TYPES OF BUSINESSES I ENGAGE WITH ONLINE

%	
54%	FOOD & GROCERY
21%	ELECTRONICS/ TECHNOLOGY
10%	FASHION/ APPAREL
10%	RESTAURANTS/ SERVICE PROVIDERS
5%	OTHER

% OF RESPONDENTS — QUESTION: WHAT TYPE OF BRANDS DO YOU ENGAGE WITH MOST? (N=31)

helpful resource

Social Consumer:

THE PROFESSIONAL

High School Persona:
Class President
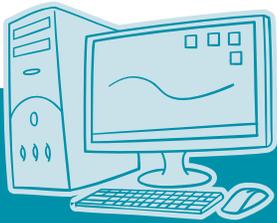
"I'm not by a TV or radio most of the day, so if there is something important going on, I usually use Twitter to find out."
—MALE, 25–34

AGE: <40   **GENDER:** Skews female   **EMPLOYMENT:** 75% are employed full or part time

WHO AM I?

+ I lead a very busy, on-the-go life, and my career is a daily priority and long-term commitment. I want to share my input with others and be seen as smart, efficient and helpful in all aspects of my life.

+ I strive for work/life balance because I know that, to truly succeed, I need to be well-rounded. I look to a variety of sources and people in my life to help me achieve this. I want to stay in the know on industry and cultural topics, share and network with industry peers and socialize and build stronger relationships with friends and family.

## MY SOCIAL NETWORKING PERSONALITY

Online, I am more introverted than extroverted and tend to maintain the same type of engagement. However, depending on my activity, I might be more guarded or expressive.

ONLINE, I THINK I AM...

Intelligent, efficient, organized (88%)
Fun, sociable, connected (10%)
Other (2%)

BUT I FEEL THAT OTHERS SEE ME AS...

Smart, professional (80%)
Helpful, genuine (10%)
In the know, up on the latest news (10%)

MY DAILY SOCIAL NETWORKING ACTIVITIES

I consider myself a rather savvy, early adopter and use the web for nearly everything from booking travel to downloading podcasts and reading blogs.

My days are hectic, and though I am always on my computer, I typically cannot get online to check Facebook or Twitter until mid-morning. Even then, my check-ins are brief. Throughout the day, my cell is my right-hand man and a great way to quickly check in on happenings in the social world.

Though professional networks are a go-to for professional purposes, I prefer to use a variety of other social sites (Facebook, Twitter, blogs, etc.) to stay on top of all the things in my life and be intelligent and informed. Throughout the week, I spend most of my time browsing Facebook, watching videos and reading blogs to ensure that I am up to date on current events, news and work-related issues.

PRIMARY SOCIAL NETWORKING ACTIVITY

35% SEARCH FOR INFORMATION I NEED

27% OBSERVE/ABSORB CONTENT

20% POST/CONTRIBUTE MY OWN ORIGINAL CONTENT

18% SHARE/COMMENT ON CONTENT I FIND THAT BENEFITS OTHERS

% OF RESPONDENTS   QUESTION: WHAT ACTIVITY DO YOU PARTAKE IN MOST OFTEN ON SOCIAL NETWORKING SITES? (N=40)

WHAT DRIVES MY SOCIAL NETWORKING HABITS?

■ Sharing/spreading relevant and important info with people

■ Professional reasons

□ Other

50%   28%   22%

Social Shopper:

THE PROFESSIONAL

High School Persona: Class President

> "When I joined up with Subway®, I was able to know when specials and deals were happening sooner than I saw them on the television...it was nice as I was able to use what they offered more and it gave me a bigger benefit than I would have gotten not knowing it thru this channel."
>
> —FEMALE, 35–44

MY SOCIAL-SHOPPING MIND-SET: I use the social web to help streamline my shopping process. It makes me a smarter, more organized shopper by notifying me of the latest product information and serving perks from brands I follow.

THE SHOPPER CONTINUUM®

PRE-TAIL®

Entering Store or Website

RETAIL

Using the Product

Purchase Moment

POST-TAIL®
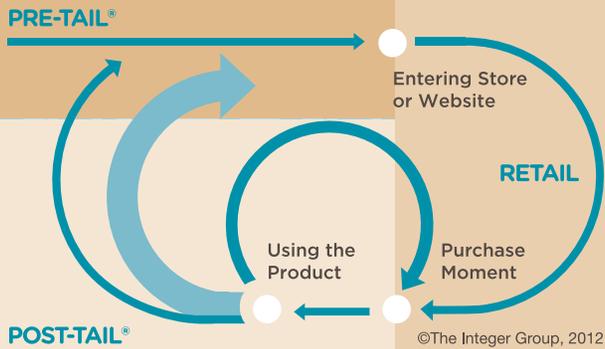
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PRE-TAIL®—Smart and Tactful

I like to keep my finger on the pulse of what's happening and be smart when it comes to shopping. I plan my shopping online, talk with friends, read reviews and websites and research an item before buying it. However, I don't actively seek out coupons or discounts before shopping because I think good quality things are worth paying for.

POINTS OF ENGAGEMENT:

WORD OF MOUTH: sponsored websites, sponsorships, posts/tweets, coupons
ADVERTISING: newspaper, sponsored sites

RETAIL—Sensorial Information Seeker

Online shopping makes shopping easy and efficient for me and my busy life. But I also enjoy getting out and shopping at retail. I like to browse and experience products through packaging, displays, signs and even samples or demonstrations. If I still have questions, I will use my smartphone. I gravitate to brand-name goods but like to try new things and will spend a little extra for quality items.

POINTS OF ENGAGEMENT:

IN-STORE INFORMATION AND ENTERTAINMENT: displays, packaging, signs, demos, sampling
DIGITAL: mobile information, video, company websites, and online-shopping platforms

POST-TAIL®—Added Value

People come to me for advice because I am a smart, in-the-know shopper. Though getting the best deal is not my priority, I will 'like' a brand or sign up for promos/newsletters if it is for something I use often or am interested in.

POINTS OF ENGAGEMENT:

WORD OF MOUTH: social networks, blogs, etc.
PERKS: rebates, sweepstakes

WHY SOCIAL-NETWORK WITH BRANDS?

%	
80%	TO GET PERKS
13%	TO ADVISE MY NETWORK
7%	TO SHOW SUPPORT/ SHOW OTHERS WHAT I LIKE
0%	TO GIVE FEEDBACK

% OF RESPONDENTS   QUESTION: WHAT IS YOUR PRIMARY REASON FOR ENGAGING WITH THE BRANDS YOU DO? (N=31)

TYPES OF BUSINESSES I ENGAGE WITH ONLINE

%	
36%	ELECTRONICS/ TECHNOLOGY
29%	FOOD & GROCERY
23%	RESTAURANTS/ SERVICE PROVIDERS
7%	FASHION/ APPAREL
5%	OTHER

% OF RESPONDENTS   QUESTION: WHAT TYPE OF BRANDS DO YOU ENGAGE WITH MOST? (N=31)

Social Consumer:

THE CREATOR

High School Persona: The Cool Kid

"[A typical day is] reading and writing... searching for new ideas from people and trying to get my ideas out there for people to read or comment on."

—MALE, 25–34

AGE: <40   **GENDER:** Skews male   **EMPLOYMENT:** 65% are employed full or part time

WHO AM I?

+ I am intrigued and inspired by the world and continually look for ways to share my own bold, creative views. I am not afraid to appear unconventional and actually like to stand out in a crowd.

+ It's important to make the most of my time, and I am not afraid to change things up, learn something new or see how I can put things together in new and interesting ways.

+ The people in my life are important to me. I am a people person and like to socialize and share my opinions. Most think I am in the know and up to date on most news and trends.

MY SOCIAL NETWORKING PERSONALITY

By nature, I am extroverted and am the same way online. I find new ways to express myself online and think I will be more extroverted in the future.

ONLINE, I THINK I AM...

Creative, unique, self-expressive, bold (51%)
Fun, sociable, connected (37%)
Other (22%)

BUT I FEEL THAT OTHERS SEE ME AS...

In the know, up on the latest news (54%)
Helpful, genuine (21%)
Hip, cool, popular (19%)
Other (6%)

PRIMARY SOCIAL NETWORKING ACTIVITY

67% POST/CONTRIBUTE MY OWN ORIGINAL CONTENT

17% SHARE/COMMENT ON CONTENT I FIND THAT BENEFITS OTHERS

11% OBSERVE/ABSORB CONTENT

5% SEARCH FOR INFORMATION I NEED

% OF RESPONDENTS   QUESTION: WHAT ACTIVITY DO YOU PARTAKE IN MOST OFTEN ON SOCIAL NETWORKING SITES? (N=40)

WHAT DRIVES MY SOCIAL NETWORKING HABITS?

- Self-expression; I want to show people who I am
- Sharing/spreading relevant and important info with people
- Other

44%   38%   18%
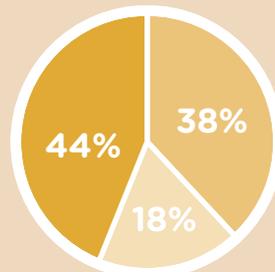
MY DAILY SOCIAL NETWORKING ACTIVITIES

The social landscape is not only a tremendous source of information and inspiration but also a canvas for my creative point of view.

It is an integral part of my daily life, and most mornings I browse Facebook or Twitter® before I leave the house.

Throughout the day, I constantly check in, browsing and creating my own content to share. If I am not on my computer, I am posting something from my phone—I must spend at least three hours on a variety of sites throughout the day.

It is also a way for me to stay connected. I actually prefer to connect with friends on Facebook vs. email. I value my relationships and like to be the in-the-know guy who posts stuff that is helpful or interesting.

> *"I feel like I'm better connected to these companies and I can directly communicate to them how happy (or unhappy) I am with their product...I feel like the company that I buy products from is more accessible and easier to communicate with."* —**FEMALE, 35–44**

Social Shopper:

THE CREATOR

High School Persona:
The Cool Kid

MY SOCIAL-SHOPPING MIND-SET: What I buy is an expression of who I am. I connect with brands and retailers on the social web to stay up to date on the latest trends and to reaffirm my image.

THE SHOPPER CONTINUUM®

PRE-TAIL®

Entering Store or Website

RETAIL

Using the Product

Purchase Moment

POST-TAIL®

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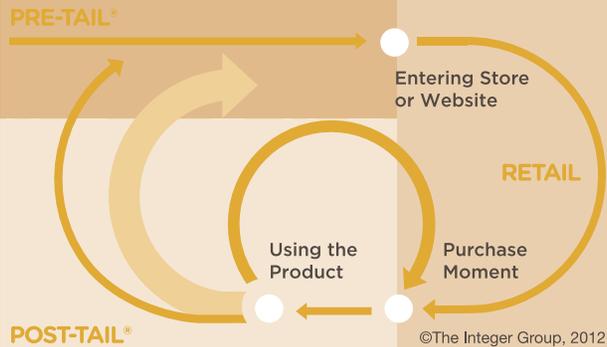
PRE-TAIL®—In the Know

I am a connected and active shopper. I like to be the first to try something and find that tracking friends and brands in my networks helps me uncover the latest trends and get exclusive perks like coupons or entertaining content. I am not afraid to join the conversation or click through content to learn more—especially if it's something new and cool I have been wanting to try.

POINTS OF ENGAGEMENT:
AHEAD-OF-THE-CURVE CONTENT: sponsored websites, sponsorships, posts/tweets, coupons

RETAIL—Discovering Something New

I am online a lot, but I prefer to shop in store. I like the atmosphere and the ability to browse and discover cool, new brands. When something piques my interest, I hop on my smartphone, examine the packaging and/or display to learn more. I may post about the things I find, ask for advice or see if there is a coupon available. I stick with quality brand names (which cost more), so I keep an eye out for bargains on the best brands.

POINTS OF ENGAGEMENT:
PROMOTIONAL AREAS: displays, end-of-aisle displays
CONTENT: packaging, mobile
COUPONS: mobile coupons

POST-TAIL®—Publicize Perspective

I like to publicize my purchases. Posting or tweeting about my recent discoveries helps me express myself in a different way and inform my network. I often connect with electronic or fashion brands but get involved with any company that I truly identify with.

POINTS OF ENGAGEMENT:
OPPORTUNITIES FOR MORE PERKS: sweepstakes, contests, email coupons, rebates
SELF-EXPRESSION: social networks, blogs, etc.

WHY SOCIAL-NETWORK WITH BRANDS?

56%	TO GET PERKS
18%	TO ADVISE MY NETWORK
14%	TO GIVE FEEDBACK
12%	TO SHOW SUPPORT/ SHOW OTHERS WHAT I LIKE

% OF RESPONDENTS — QUESTION: WHAT IS YOUR PRIMARY REASON FOR ENGAGING WITH THE BRANDS YOU DO? (N=31)

TYPES OF BUSINESSES I ENGAGE WITH ONLINE

36%	ELECTRONICS/ TECHNOLOGY
28%	FASHION/ APPAREL
28%	FOOD & GROCERY
8%	RESTAURANTS/ SERVICE PROVIDERS
0%	OTHER

% OF RESPONDENTS — QUESTION: WHAT TYPE OF BRANDS DO YOU ENGAGE WITH MOST? (N=31)

PROJECT METHODOLOGY

For this project, we used a combination of primary and secondary research to build a fact base to analyze the landscape of social networking as it pertains to its current state, how it affects both the shopper and consumer mind-set and its relation to physical and digital retailers.

We conducted a thorough review of secondary resources to build a knowledge base and guide our primary research. Secondary resources included subscription-based resources such as Iconoculture®, Experian® Simmons, Warc® and eMarketer, as well as publicly available information from industry associations, publications, studies, blogs and platform providers.

To fully understand this rapidly evolving space and its relation to consumers and shoppers, we leveraged a variety of primary research, including expert interviews, a quantitative consumer study and a qualitative shopper study.

Expert Interviews

In addition to leveraging social media, digital and media experts within the Integer network, we conducted interviews with seven industry participants to gather real-time insights regarding the project objectives. Participants included consultants, internal brand community managers and external digital strategists/agencies.

Quantitative Consumer and Shopper Research

Integer, in conjunction with iModerate research technologies®, conducted a quantitative survey with 308 frequent social networkers and intercepted 40 respondents to participate in one-on-one live conversations via the iModerate proprietary instant-messenger platform to gain deeper insight regarding habits and practices online.

Qualitative Shopper Research

Integer, in conjunction with Qualvu, completed a qualitative survey with 24 frequent social networkers. Participants answered several questions regarding their social networking usage and habits and provided video footage of their "shopping journeys" to illustrate their social media behaviors and motivations throughout (Pre-Tail®, Retail, Post-Tail®).

About the Shopper Journey

We used the Integer Shopper Continuum® to frame the shopper journey and help us understand and articulate the role of communication and marketing actions during three distinct phases of shopping behavior: Pre-Tail®, Retail and Post-Tail®.

- **THE PRE-TAIL® PHASE** *includes all the things people do when preparing to shop and select a retailer, including how they respond to all things brands or retailers do to influence behavior.*
- **THE RETAIL PHASE** *is all activities that take place in a real or virtual retail environment. This includes the behavior of the shopper and the actions of the retailer and brand on the shelves (real or virtual).*
- **THE POST-TAIL® PHASE** *encompasses what happens after purchase. It includes things retailers and brands can do to reinforce and celebrate the purchase and encourage shoppers to repeat their behavior again and again.*

About the Coca-Cola Retailing Research Council of North America

The Coca-Cola Retailing Research Council of North America (www.ccrrc.org) conducts studies on issues that help retailers respond to the changing marketplace. The unique value of these studies rests with the fact that retailers define the objective and the scope of each project and "own" the process through the release of the study and dissemination to the broader retail community.

Members of the Coca-Cola Retailing Research Council of North America:

- *David Ball, Ball's Food Stores Inc.*
- *Jonathan Berger, The Consumer Goods Forum*
- *Chris Coborn, Coborn's Inc.*
- *Mike Donnelly, The Kroger Co.*
- *Randy Edeker, Hy-Vee, Inc.*
- *Cathy Green Burns, Food Lion LLC*
- *Jerry Golub, Price Chopper Supermarkets*
- *Mark Irby, Publix Super Markets*
- *Jay Lawrence, MAL Enterprises, Inc.*
- *John Lucot, Giant Eagle, Inc.*
- *Tim Mason, Tesco U.S.*
- *Jason Potter, Sobeys*
- *Leslie Sarasin, Food Marketing Institute*
- *Carlos Smith, Bodega Latina Corporation*
- *Greg Sullivan, Walmart Stores, Inc.*
- *J.K. Symancyk, Meijer Inc.*
- *Todd Vasos, Dollar General Corporation*
- *Lauri Youngquist, Knowlan's Super Markets, Inc.*

About The Integer Group – @IntegerGroup

The Integer Group (www.integer.com) is one of the world's largest retail, promotional and shopper marketing agencies and a key member of the TBWA\ Marketing Services portfolio. The Integer Group resides At the Intersection of Branding and Selling® and creates strategic marketing solutions for clients in categories that include beverage, packaged goods, telecommunications, fast food, home and shelter and power sports. Join Integer in a conversation on shopping culture and brand strategy at www.shopperculture.com or on Twitter @shopperculture.

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