# THE CONCLAVE

## COMPLETE SOCIAL MEDIA MEASUREMENT STANDARDS JUNE 2013

**Introduction:**
The Conclave is a broad coalition of B2B and B2C companies, PR and social media agencies, and industry associations that work with paid, owned, and earned social media. It initially convened in Durham, NH in October 2011 to establish standard definitions and best practices for social media measurement. At this meeting it established a set of priority issues that required standards. Those 6 areas are:

1. Content & Sourcing
2. Reach & Impressions
3. Engagement & Conversation
4. Opinion & Advocacy
5. Influence
6. Impact & Value

**The Process:**
Each area was addressed by a subcommittee of members. To ensure the highest level of consistency across the industry, the subcommittee frequently worked in concert with other organizations that were also in the process of developing standards. As each set of standards was written, it was posted to our website www.smmstandards.com for review and comments. After 2 months the comments were aggregated, the standards were updated, reposted to www.smmstandards.com, and declared interim standards.

**Now What?**
If you would like to participate in this process, please comment on our website, or get in touch (smmstandards@gmail.com) to be put on the email list. More importantly, in order to reap the benefits of established standards it is necessary to put them to use. So we ask that you share them with your team, your bosses, your agencies, your providers, and whatever professional associations you may belong to.
The organizations that support these standards include:

- Institute for Public Relations (IPR)
- Institute for Public Relations Measurement Commission (IPR MC)
- International Association for Measurement and Evaluation of Communications (AMEC)
- Council of PR Firms (CPRF)
- Digital Analytics Association (DAA)
- Public Relations Society of America (PRSA)
- Word of Mouth Marketing Association (WOMMA)
- International Association of Business Communicators (IABC)
- Chartered Institute of PR (CIPR)
- Federation Internationale des Bureaux d'Extraits de Presse (FIBEP)
- Global Alliance for Public Relations and Communications Management
- Society for New Communications Research (SNCR)
- Client participants include research and communications leaders from Dell, Ford Motor Company, General Motors, McDonald's, Procter & Gamble, SAS, Southwest Airlines, and Thomson Reuters, just to name a few.

| Metric name | Content & Sourcing |
|---|---|
| Metric description and application | The Conclave published its first proposed interim standard in June at the European Measurement Summit hosted by AMEC in Dublin. The Sources & Methods Transparency Table (see page 3) is designed specifically to address the challenges clients face in knowing what's inside social media measurement reports from various agencies, research providers, and software vendors. The standardized table mirrors the "nutrition tables" used by many countries for easy comparison of calories, nutrition, and ingredients in food products.<br><br>Specifically, the table captures critical information about social media content sources and methods to provide full transparency and easy comparison across analyses: What content and channels are included? How is the data collected? How deep is the analysis? Are multiple languages captured? Via native-language queries? How are key metrics calculated for reach, engagement, influence, and opinion/advocacy? How is sentiment coded? How is irrelevant content (bots, spam blogs, etc.) filtered? What proprietary methods were used in the analysis? What search strings were used? |
| Status | Published |
| Version, date, and author(s) | Version 1.0<br>Provided for public comment June 2012<br>Authors: Tim Marklein, AMEC, and members of the #SMMstandards Conclave |
| Standards or guidelines | Standards |
| Metric type | Outtake |
| Standards | Use Table on Page 3 |

# Introducing… Interim Standard #1. Sources & Methods Transparency Table

| #SMMStandards – Sources & Methods Transparency Table | www.smmstandards.org |
|---|---|
| Timeframe Analyzed | |
| Research Lead(s) | |
| Channels Analyzed | |
| Data/Content Sources | |
| Analysis Depth | ☐ Automated ☐ Manual ☐ Hybrid ☐ All Content Reviewed ☐ Rep. Sample |
| Source Languages | |
| Search Languages | |
| Sentiment Coding | ☐ Automated ☐ Manual ☐ Hybrid ☐ Manual Sampling: _____<br>☐ 3-pt scale ☐ 5-pt scale ☐ Other scale ☐ At entity level ☐ Paragraph/doc level |
| Spam/Bot Filtering | ☐ Automated ☐ Manual ☐ Hybrid ☐ Includes news releases ☐ Excludes releases |
| Metrics Calculation and Sources | |
| -- Reach | |
| -- Engagement | |
| -- Influence | |
| -- Opinion/Advocacy | |
| Proprietary Methods | |
| Search Parameters | See full search string list on page ___ of this report |

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# Completed Sample: Sources & Methods Transparency Table

| #SMMStandards – Sources & Methods Transparency Table | www.smmstandards.org |
|---|---|
| Timeframe Analyzed | January 1, 2012 – June 30, 2012 |
| Research Lead(s) | Richard Bagnall, Gorkana Group |
| Channels Analyzed | Twitter (partial), Facebook (brand pages only), Linkedin, YouTube, blogs, forums |
| Data/Content Sources | Google search, Radian6, Sysomos, BrandWatch, Twitter API, Facebook API, YouTube |
| Analysis Depth | ☐ Automated ☐ Manual ☑ Hybrid ☐ All Content Reviewed ☑ Rep. Sample |
| Source Languages | English, German and Mandarin only |
| Search Languages | Native-language queries: English, German, Mandarin |
| Sentiment Coding | ☐ Automated ☐ Manual ☑ Hybrid ☑ Manual Sampling: every 50 posts coded<br>☐ 3-pt scale ☑ 5-pt scale ☐ Other scale ☑ At entity level ☐ Paragraph/doc level |
| Spam/Bot Filtering | ☐ Automated ☐ Manual ☑ Hybrid ☑ Includes news releases ☐ Excludes releases |
| Metrics Calculation and Sources | |
| -- Reach | Daily unique visitors for specific URLs via Comscore (no multipliers) |
| -- Engagement | Channel-specific metrics direct from channels |
| -- Influence | N/A |
| -- Opinion/Advocacy | Human reading and coding |
| Proprietary Methods | Proprietary index for calculating quality score |
| Search Parameters | See full search string list on page 32 of this report |

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| Metric name | Reach & Impressions |
|---|---|
| Metric description and application | This initiative was part of a collaborative effort between the DAA and the #SMMstandards Conclave. These foundational measures will serve as the basis for defining data collection in social media and will enable subsequent metrics and potentially other standards to be calculated consistently.<br><br>It should be noted that in order to arrive at standard definitions for Reach & Impressions, we first had to establish definitions for "item" and "mention." Thus, this project consists of defining 4 specific metrics that can help measurers of social media to utilize consistent measures and definitions. |
| Caveat | The following social media definitions were developed based on a perfect world scenario. In practice, measuring social media today depends heavily on the methodologies of individual tools and solutions applied to the task. Results will vary. Our definitions are considered the ideal way to measure Reach & Impressions, with cognition that the methods available to do so today are inherently flawed because of their inability to precisely determine unique individuals across social platforms, devices, and media. |
| Status | Published |
| Version, date, and author(s) | Version 1.0<br>Provided for public comment November 2011<br>Authors: DAA President John Lovett, DAA Social Media Standards Sub-Committee Lead Josh Dreller, Linda Schumacher, DAA Standards Co-Chair Darrin Wood, DAA Standards Co-Chair Anna Long, Nick Necsulescu, Sarah Farebrother, Eric Swayne, Ned Kumar, and Eric Feinberg |
| Standards or guidelines | Standards |
| Metric type | Outtake |
| Detailed description | ■ An **"item"** of content is a post, micro-post, article, or other instance appearing for the first time in a digital media. Comments: This definition of item replaces "clip," "post," and other unclear terminology. Items of content refer to the content vehicle in its entirety, which means that a single item can contain multiple mentions and derivatives. In general, derivatives of items such as comments, likes, etc. should not be counted as additional items. If they are used, clear explanation and justification of why they are included must be included.<br>■ A "**mention"** refers to a brand, organization, campaign, or entity that is being measured. Mentions are typically defined in social media using Boolean search queries. These queries may include "AND" as well as "OR" statements to capture specific brands, campaigns, or subject matter topics, as they pertain to the goals of the search objective. Furthermore, |

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| | mention queries may also include "NOT" statements to filter off-topic mentions from the data set.<br>■ **"Impressions**" represent the number of times an item has an opportunity to be seen and reach people, based on the simple addition of those audiences that have had the opportunity to see it. Perhaps better called "potential impressions," this term represents the gross number of opportunities for items to be seen, regardless of frequency of display, method of accessing the item, or audience duplication. It will typically count the same individuals multiple times and will include individuals who had the opportunity to see the item, but did not in fact see it at all. A virtue of this metric is that it is somewhat comparable to metrics used in traditional media. The term "displayed" applies across channels, browsers, devices, and other methods by which an individual might see an item.<br>■ "**Reach"** is the total number of unique individuals who had the opportunity to see an item. Reach is typically a constructed metric that is based on the number of impressions, refined to eliminate the duplication of individuals who have had the opportunity to see the item through multiple media channels, or access points (e.g. laptops and hand-held devices) and to all eliminate repeated serving of the item other than valid reproductions of that item across digital media.<br>The reach metric seeks to establish an ideal environment where one can quantify individual people across platforms using social media monitoring tools, social platforms, and/or panel-based measurement solutions. However, in reality, each tool, platform, and solution may have a unique method of calculating reach and each might introduce duplication and error.<br>Reach is typically quantified using social media monitoring tools, social platforms, and/or panel-based measurement solutions. Each tool, platform, and solution may have a unique method of calculating reach. For this reason it is critical to use the Sources & Methods Transparency Table (see page 3) to identify data collection sources. Caution: use of multipliers or "rules of thumb" are NOT standard processes and should be avoided.<br>Reach can be refined further according to social media objectives, by narrowing audiences, or by other means.<br>Reach represents potential opportunities to see. |
| Source documents | Reach & Impressions derived from work done by the Digital Analytics Association Standards Committee. |

| Metric name | Engagement & Conversation |
|---|---|
| Metric description and application | The key concepts of Engagement & Conversation are frequently discussed by social media advocates, but rarely defined with enough precision to guide sound measurement.<br>Members of the #SMMstandards Conclave, debated many of the different issues involved across channels, disciplines, and ultimately arrived at a core definition for both terms with key metrics for evaluating both areas. |
| Status | In November of 2012, these standards were posted for industry comments on our website. They have been adopted as an interim standard. |
| Version, date, and author(s) | Version 1.0<br>Provided for public comment November 2011<br>Authors: Katie Paine, Eve Stevens, Angela Jeffrey, and members of the #SMMstandards Conclave |
| Standards or guidelines | Standards |
| Metric type | Outtake or Outcome depending on program's objectives |
| Detailed description.<br>*This is the actual standard, and must include full description of how to use this metrics* | ■ **"Engagement"** is defined as some action beyond exposure, and implies an interaction between 2 or more parties. Social media engagement is an action that typically occurs in response to content on an owned channel ( i.e. when someone engages with you).<br>■ **"Conversation"** is defined as some form of online or offline discussion by customers, citizens, stakeholders, influencers, or other third parties. Social media conversation includes online discussion about your organization, brand, or relevant issues, whether via your channel or third party channels (i.e. when someone talks about you). |
| Best Practices | ■ Any measure of Engagement & Conversation must be tied to the goals and objectives for your organization, brand or program.<br>■ Engagement & Conversation both occur offline and online, and both must be considered if you intend to integrate your metrics with other marketing or communications efforts.<br>■ Engagement counts such actions as: likes, comments, shares, votes, +1s, links, retweets, video views, content embeds, etc. Engagement types and levels are unique to specific channels, but can be aggregated for cross-channel comparison.<br>■ Engagement should be measured by the total number of interactions within and/or across channels; the percentage of your audience engaged by day/week/month; and the percentage of engagement for each item of content an organization publishes.<br>■ Conversation counts such items as blog posts, comments, tweets, Facebook posts/comments, video posts, replies, etc. Conversation types and levels are unique to specific |

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| | channels but can be aggregated for cross-channel comparison.<br>■ Conversation should be measured by the total number of items that mention the brand, organization or issue (within and/or across channels); the number of mentions within each item; and the opportunities to see (OTS) for each item, calculated by the readership at the time of posting (unique daily/monthly visitors, first-order fans/followers, view counts, etc.).<br>■ Engagement manifests differently by channel but is typically measurable at various points based on effort required, inclusion of opinion and how shared with others.<br>■ Engagement & Conversation could be, but are not necessarily, outcomes. Organizations may weight Engagement & Conversation types differently based on their goals, but Engagement & Conversation metrics should be consistent across an organization. |
| Source documents | Engagement & Conversation are part of a series of standards being developed by the #SMMstandards Conclave. |
| Validity and reliability of the standard | Testing is not required. |
| Team leads and contact information | Katie Paine, CEO, Paine Publishing, LLC; measurementqueen@gmail.com |

| Metric name | Opinion & Advocacy |
|---|---|
| Metric description and application | Sound measurement of sentiment, opinion, and advocacy is challenging, particularly when considering the rigor required to derive metrics that can be applied as indicators of business outcomes. Traditional marketing research has such time-tested and rigorous standards in place, executed by the disciplined research expertise that is required to implement the proper techniques produce defensible results.<br><br>But times are changing: The proliferation of automated social media measurement solutions has democratized access to social media data. At the same time, techniques and methodologies applied through these tools are not as tested and qualified and those involved in analyzing the data are not necessarily trained analysts – in contrast to traditional marketing research.<br><br>This document is meant to provide guidance to communication experts who are not trained in marketing research, but who are considering leveraging social media data in their measurement approach. |
| Status | These standards have been posted for industry comments on www.smmstandards.com. They were open for comment until July 31, 2013. They are considered adopted as an interim standard. |
| Version, date, and author(s) | Version 1.0<br>Provided for public comment June 1, 2013<br>Authors: Neil Beam, Eve Stevens, and other members of the #SMMstandards Conclave |
| Standards or guidelines | Standards |
| Metric type | Outcome depending on the program's objectives |
| Detailed description<br>*This is the actual standard, and must include full description of how to use this metrics* | ■ **Sentiment** is a component of opinion and advocacy. Sentiment is the feeling the author is trying to convey, often measured through context surrounding characterization of object.<br>■ **Opinion** is a view or judgment formed about something, not necessarily based on fact or knowledge. Standard indicators of opinion standards have not yet been achieved, but typically opinion is definitively articulated and associated to the speaker.<br>■ **Advocacy** (n) vs (v) is a public statement of support for or recommendation of a particular cause or policy. Advocacy requires a level of expressed persuasion.<br>■ The key distinction between **"advocacy"** and **"opinion,"** is that advocacy must have a component of recommendation or a call to action embedded in it.<br>■ These definitions are a good starting point when considering the measurement of sentiment, opinion, and |

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| | advocacy, respectively. | |
| Guidance | ■ Social media conversations can provide insight into social media user sentiment, opinions, and levels of advocacy for a brand/product/issue.<br>■ There are several factors to consider when applying social media sentiment, opinions, and advocacy metrics to generate insights and assess communications outcomes.<br>■ Results are non-conclusive: Many practitioners think the results of social media measurement are conclusive and allocate budgets and execute projects solely on social data. In fact, comprehensive measurement of the online population is impeded by data availability and other challenges. It is possible that sentiment, opinion, and advocacy can be positively impacted by public relations efforts without any evidence of this change occurring online.<br>■ Makeup of those involved in the conversation: Are your target audiences online and participating in social conversations? Is the conversation you are assessing for sentiment, opinion, and advocacy made up of your target audience? If not, social media measurement is not the correct methodology to achieve insights into your target audience perceptions, opinions, and persuasion.<br>■ Inherent bias and limited projection: Social media measurement can only examine comments from those who are proactively offering an opinion or statement and doing so online. The opinions/attitudes of those who are not actively participating in the conversation are not measured.<br>■ Lack of quality, veracity in automated sentiment measurement: Automated sentiment methods are limited and typically deliver lower quality data compared to manual evaluation methods.<br>■ Inconsistent definitions and methods for deriving sentiment, opinion, and advocacy: Unlike marketing research techniques, where agreement on perception statements can be understood and accepted across industry, what constitutes sentiment, opinion, and advocacy within social media is subjective and often industry-specific. | |
| Best Practices | ■ Because social listening, by itself, is not projectable to the opinion and advocacy of all stakeholders, unless quantitative analysis is done to align the counting method against the key performance indicator, it is not an independently reliable method for quantitative measurement.<br>■ Do not use social media sentiment, opinion, or advocacy measurement as audience indicators if your target audience is not represented in data analyzed.<br>■ Social media sentiment, opinion, and advocacy metrics limitations need to be clearly understood amongst stakeholders.<br>■ Do not use social media measurement as sole data source when making strategic business decisions.<br>■ Social media sentiment, opinion, and advocacy data | ■ |

should be assessed in conjunction with data arrived at through other research means.

- Sentiment, opinion, and advocacy metrics derived through automated means need to be evaluated understanding limitations and ideally considered only in conjunction with data from higher quality measurement methods.
- Definition, scope, and methodology transparency should be standard parts of any social media metric reporting (see Content & Sourcing Standards).
- When assessing social media sentiment, opinion, and levels of advocacy, measure favorability as well as negativity to understand the holistic nature of the conversation.
- Distinction should be made between the purpose and function of social media sentiment research and market research. The following table provides the advantages of each:

| Social Media Measurement | Quantitative Market Research |
|---|---|
| ■ Idea exploration and uncover white space opportunities | ■ Clarify or validate existing knowns |
| ■ Identification of the elements of opinion and advocacy | ■ Test specific hypothesis with statistical confidence |
| ■ Understand the characteristics of who is discussing opinion and advocacy | |
| ■ Understand the drivers of the conversation | ■ Identify evidence of cause and effect relationships |
| ■ Dimension and range of the conversation categories | ■ Examine specific relationships |
| ■ Explain findings of a quantitative study | ■ Project results to a larger population |

| **Metric name** | **Influence** |
|---|---|
| Metric description and application | Marketers and business communicators have been targeting so-called "influencers" or "influentials" for decades. It is a strategy born of experience and intuition—a sense that people are influenced by other people, and that some people wield greater influence than others. But there is wide variation in what people mean by influencers or influencer marketing. The situation begs for a common language and conceptual framework to aid practitioners.<br>WOMMA has developed the following definitions with an eye for academic rigor but also practitioner utility. With this in mind consider that there are 7 billion+ people on the earth. While anyone can exert influence in some manner on others it is rarely practical for brands to focus on reaching everyone, and hence there is an interest in aiming communications toward those people who have disproportionate influence in the marketplace. |
| Status | These standards have been posted for industry comments on www.smmstandards.com. They were open for comment until July 31, 2013. They have been adopted as an interim standard. |
| Version, date, and author(s) | Version 1.0<br>Provided for public comment June 1, 2013<br>Authors: Phillip Sheldrake, Brad Fay, Neil Beam, and the Standards Committee for WOMMA |
| Standards or guidelines | Standards |
| Metric type | Outcome depending on the program's objectives |
| Detailed description<br><br>This is the actual standard, and must include full description of how to use this metrics | ■ "**Influence**" is the ability to cause or contribute to a change in opinion or behavior.<br>■ Where the initial actor is a "**key influencer"** who is: A person (or group of people) who possess greater than average potential to influence due to attributes such as frequency of communication, personal persuasiveness, or size of and centrality to a social network, among others.<br>■ "Key Influencers" interact with others and those they influence are **"Influencees:"** A person or group of people who change their opinion or behavior as the result of exposure to new information.<br>■ Therefore **Influencer Marketing** is: The act of a marketer or communicator engaging with key influencers to act upon influencees in pursuit of a business objective.<br>■ Research shows a marketer is most effective when focusing resources on Key Influencers with the highest propensity to influence a population of Influencees who have the highest propensity to be influenced. |

| Metric name | Impact & Value |
|---|---|
| Metric description and application | Impact & Value represent the ultimate outcome of a social media effort. The Impact & Value of a campaign is defined by and dependent on the goals of the program and the organization. It is often confused with the term ROI (Return on Investment). While ROI might be one outcome, it is far from the only impact or value that can be attributed to social media. |
| Status | These standards have been posted for industry comments on www.smmstandards.com. They were open for comment until July 31, 2013. They are now considered adopted as an interim standard. |
| Version, date, and author(s) | Version 1.0<br>Provided for public comment June 1, 2013<br>Authors: Phillip Sheldrake, David Geddes, Katie Paine, and other members of the #SMMstandards Conclave |
| Standards or guidelines | Standards |
| Metric type | Outcome depending on the program's objectives |
| Detailed description<br>*This is the actual standard, and must include full description of how to use this metrics* | ■ Impact: The effect of a social media campaign, program, or effort on the target audience.<br>■ Value: The importance, worth, or usefulness of something. Value may be described in financial terms (see ROI below). Value may be described in non-financial terms, for example in business performance management (BPM) terms. Value can be short-term or long-term. It may be expressed in any number of ways including a comparative cost savings, shortened sales cycle, increased customer retention, or renewals, to name a few.<br>■ ROI: Return on Investment. A financial performance measure used to evaluate the efficiency of an investment or to compare the efficiency of a number of different investments. To calculate ROI, the benefit (return) of an investment is divided by the cost of the investment; the result is expressed as a percentage or a ratio.<br>■ Any measure of Impact & Value must be tied to the goals and objectives for your organization, brand or program.<br>■ Assessing the value and impact of a campaign is a complex process, with numerous variables that must be accounted for and included in any calculation. Variables need to be weighted appropriately and should be based on customer research data. It cannot be reduced to a simple formula that applies equally to all organizations. Value is contingent on strategy. |

# Acknowledgements

The #SMMstandards Conclave is an entirely volunteer group of people representing various associations, organizations and academia. Our members include:

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Coordinator: Katie Paine, Paine Publishing