SOCIAL
LISTENING

Why the Pandemic Is Sparking New Use Cases for an Underutilized Tool

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SOCIAL LISTENING: WHY THE PANDEMIC IS SPARKING NEW USE CASES FOR AN UNDERUTILIZED TOOL

The changes to everyday life due to COVID-19 are causing a resurgence of interest in social listening. Businesses are using it to understand the evolving consumer mindset, craft appropriate marketing messages, and respond quickly to changing circumstances.

Why has social listening become more important during the pandemic?

Businesses have torn up their normal ways of operating, and they are looking to social media for fast, raw insights. Because consumers are using social media more heavily now, social listening can help marketers keep tabs on real-time trends and audience sentiment.

How are marketers using social listening right now?

They are using it to identify consumer needs, manage organic social media, gauge sentiment, manage crises and develop marketing creative.

How has social listening evolved in the past few years?

It started out as a way to passively track brand mentions and sentiment, but with advanced features such as AI, marketers can get more actionable reports and insights as well as make predictions. The ability to track images has also improved, and it's gotten easier to incorporate social listening insights into other analytics.
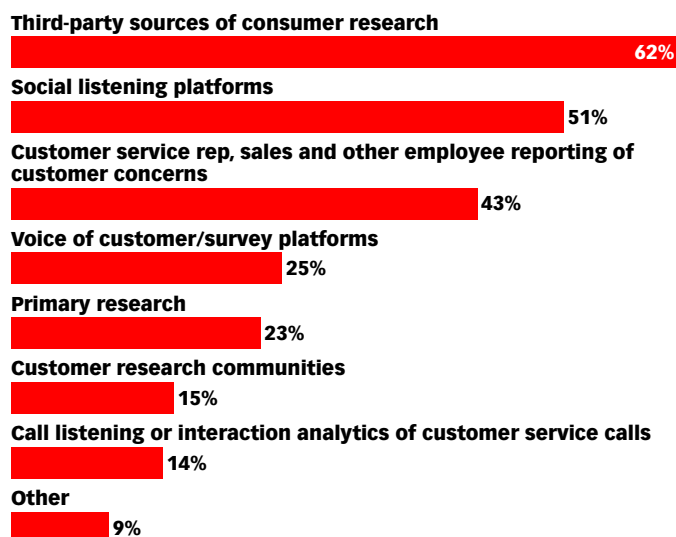
What still holds social listening back?

It's still heavily reliant on Twitter as a data source. Listening inside of things like Instagram Stories, TikTok and private messaging is difficult or impossible. That means brands can't use social listening as a single source of truth. They still need to bolster it with other research.

WHAT'S IN THIS REPORT? This report analyzes why marketers are turning to social listening during the pandemic and what they are using it for. It also explores new features and capabilities.

From Which Sources Are Marketing Leaders Worldwide Getting Rapid Information About Consumers During the Coronavirus Pandemic?, March 2020
% of respondents, March 2020

Third-party sources of consumer research
62%

Social listening platforms
51%

Customer service rep, sales and other employee reporting of customer concerns
43%

Voice of customer/survey platforms
25%

Primary research
23%

Customer research communities
15%

Call listening or interaction analytics of customer service calls
14%

Other
9%

Note: n=215
Source: Gartner as cited in company blog, March 24, 2020
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KEY STAT: Half of worldwide marketers have turned to social listening to understand consumers' changing preferences during the pandemic.

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FOUR REASONS WHY SOCIAL LISTENING IS BACK IN VOGUE

Marketers have long turned to social media to hear and respond to what people are saying, to gauge sentiment, and to inform and support their marketing strategy. But the coronavirus pandemic has put fresh importance on the practice known as social listening.

At a time when nearly every aspect of life has been altered by business closures, stay-at-home orders, social distancing and job losses—and when consumers are demanding that companies do more than pay lip service to issues of race and equality—it's more critical than ever for businesses to listen to their consumers.

Social Listening: A Glossary

Social listening starts with **social monitoring**—the process of tracking user-generated social media conversations that directly reference a brand or product. Social monitoring can take place in channels owned or managed by the brand or in the broader social media ecosystem. It is typically used to help respond to messages and gauge sentiment.

Social listening takes the process of social monitoring several steps further. It is the practice of gathering consumer conversations in social media and then using those insights to inform or support business activities.

In social listening, marketers move beyond tracking what's said directly *about* their brands and also track conversations *related* to the brands. This could include things about competitors, subjects related to a marketer's products or general topics that a marketer could tie into.

Marketers use this information for a variety of needs, including to understand what their customers or potential customers are discussing in social media, inform their marketing strategy, test new types of marketing content, or generate ideas for new products or services.

Marketers can do basic social listening manually, by searching social media properties using keywords or hashtags, or by reading influencer posts, but some also use a **social listening platform.**

Features of a social listening platform include:

Keyword tracking: Gathering posts and other social content that mention chosen keywords.

Conversation analysis: Understanding more about what's said; who's saying it, their sentiment, and how others have engaged with the content by favoriting, commenting, sharing, etc.

Real-time trends: Rapid notification when a selected topic is mentioned, or if conversation in a designated area is spiking.
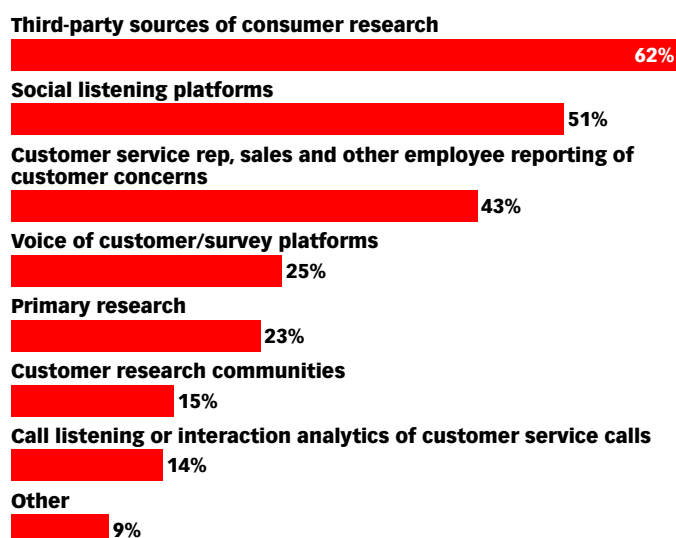
Historical trends: The ability to analyze past results and compare with current ones.

Reports and dashboards: A way to put essential content and trends into formats that stakeholders or rapid-response teams can use.

According to research conducted by Gartner during a March 2020 webinar, 51% of worldwide marketing leaders turned to social listening platforms to keep up with consumers' changing desires during the pandemic.

From Which Sources Are Marketing Leaders Worldwide Getting Rapid Information About Consumers During the Coronavirus Pandemic?, March 2020
% of respondents, March 2020

Source	%
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Other	9%

Note: n=215
Source: Gartner as cited in company blog, March 24, 2020
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Many marketers have already been doing social listening in some form and aren't turning to it for the first time right now. But the depth of their interest and their willingness to act based on the data they obtain has grown during the pandemic.

- "Brands are **increasing the frequency of their social listening reports, and they're taking more decisive steps** to act on the learnings." —*Ross McCormack, Social Strategy Director, Havas Media Group*

- "COVID-19 and Black Lives Matter have really awakened brands, especially our larger brands. They realize that **when it comes to loyalty and new customer acquisition, carrying on a meaningful conversation is equally important as performance marketing."** —*Jason Roussos, Senior Vice President of Strategy, Adlucent*

- "We've used social listening in the past two months to report all the way to top management, to our CEO. We are showcasing that **we can provide meaningful insights faster than traditional insights campaigns** or surveys would do." —*Simon de Beauregard, Engagement Director for Absolut, Malibu, Kahlúa and Smithworks labels, Pernod Ricard*

- Social listening has **"become the go-to because of the availability and the timeliness** that we're able to get consumer insights. While we've known that for some time, it's been heightened given the pandemic." —*Brian Wright, Social Media Listening and Intelligence Leader, Wells Fargo*

- **"Social listening is the canary in the coal mine.** It is where you're going to first pick up on themes that you really do need to pay attention to." —*Mark Viden, Senior Vice President, Brand, CommonSpirit Health*

These executives' sentiments point to the four reasons why social listening has become more important in recent months:

1. There has been a **substantial and sustained increase in social media usage** because face-to-face conversation has been curtailed during the pandemic.

2. **Businesses have been forced to tear up their normal ways of operating,** and they are scrambling for information on how to proceed.

3. Social listening can help marketers **track real-time consumer sentiment and make quick shifts in messaging** or take advantage of trends circulating in social media.

4. **Marketers want to show empathy to their consumers,** and social listening is, literally, a way to say, "We hear you."

NO. 1: PEOPLE ARE USING SOCIAL MEDIA MORE HEAVILY

As many as half of US adults are using social media at higher rates during the pandemic. In several waves of polling conducted between late March and early May, The Harris Poll found that between 46% and 51% of US adults were using social media more since the outbreak began. In the May 1–3 survey, the last time Harris asked the question, 51% of total respondents—including 60% of those ages 18 to 34 and an even-higher 64% of those ages 35 to 49—said they were using platforms such as Facebook, Instagram or Twitter more. Even among those ages 65 and up, 34% reported increased usage.

With that increase in usage comes more discussion on social media. And marketers are eager to keep up with the flow of information.

"Everything we are saying, everything we're talking about, everything we are posting or reading has some context for the pandemic," said Mike Dossett, vice president and director of digital strategy at RPA, an ad agency. "That gives us some really interesting insights from a behavioral psychology standpoint. We can find answers to questions like: Are people more fearful? Are they hopeful or optimistic? Are they eager to get back out? Are they excited to live in this new normal? What are they pining for? More people are being more vocal about that."

A similar thing is happening in the B2B world. In the pharmaceutical industry, for example, "Sales reps can't go into doctor's offices in most cases right now, so the way to reach doctors is through social, or online," said Julie Hurvitz Aliaga, senior vice president of social media at medical marketing agency CMI/Compas. "Social media is where the bulk of conversations are happening right now when people can't be together in-person."

For more on social media usage trends during the pandemic, see our report **"US Social Media Usage: How the Coronavirus Is Changing Consumer Behavior."**

NO. 2: BUSINESSES ARE SCRAMBLING FOR INFORMATION

Consumers are using social media more, and at the same time marketers are racing to understand the pandemic's impact on consumers' lives so they can recraft their marketing messages and build new business operating plans. According to Advertiser Perceptions research conducted April 16–20, 2020, 73% of US agency and brand marketers held back a campaign until later in the year, and 54% stopped or pulled a campaign mid-flight.

How Has the Coronavirus Pandemic Affected US Agencies and Brand Marketers' Advertising Efforts?
% of respondents, March & April 2020

	Wave 1 (Mar 17-20)	Wave 2 (Apr 1-4)	Wave 3 (Apr 16-20)
Held back a campaign from launching until later in the year	49%	64%	73%
Stopped or pulled a campaign mid-flight	45%	50%	54%
Adjusted media type usage or shifted budget among media types	48%	49%	59%
Canceled a campaign completely (pre-launch)	34%	44%	50%
Paused all new advertising efforts until later in the year	38%	35%	42%

Note: wave 1 n=201; wave 2 n=152; wave 3 n=151
Source: Advertiser Perceptions, "Coronavirus Effect on Advertising Report: Wave 3," May 7, 2020
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In April 2020 research by digital asset management platform Bynder, 49% of worldwide marketing professionals said they felt their marketing was affected either strongly or extremely by COVID-19, and 27% felt very concerned about making missteps that would harm their company's brand image.

That fear has left businesses scrambling to gain insights wherever they can find them. Because social media is a veritable sea of information about the customer journey, social listening is a tool that marketers are turning to.

"Marketers seem more engaged with listening because the status quo is basically shaken, and now they need to figure out what the new landscape looks like," said Vijay Renganathan, vice president of global solutions at Synthesio, a social listening platform owned by Ipsos.

NO. 3: SOCIAL LISTENING IS RAPID AND REAL-TIME

The speed of social listening is a huge advantage right now. Marketers need to keep close tabs on real-time sentiments so they can make quick shifts in marketing messaging or take advantage of trends and opinions circulating online. They are also paying close attention to how consumers are talking about their marketing as well as their competitors' marketing.

With business conditions changing rapidly as the world deals with virus spikes and various stages of economic reopening, the need for immediate information is critical.

"Things are changing, governments are changing rules, customers are changing," said Janie Talerico, director of media strategy at ad agency Merkle. "It's really important for our clients to be on top of how customers are feeling, what they're talking about, how their daily habits are changing, how they're viewing brands, and what they're saying."

"The pandemic has put a renewed focus on the here and now," said Liz Cole, vice president and group director for social strategy at Digitas. "[Data from social listening] tells you something about the last 24 hours instead of the last 24 months."

Prior to the pandemic, marketers put less emphasis on the real-time aspect of social listening. If they were using it for planning purposes, they were often fine with getting reports on a weekly basis (although they usually tracked comments and complaints on a more frequent basis).

That's all changed now. "We're feeding some of our clients data hourly because there's so much change right now," Roussos of performance marketing agency Adlucent said. "Before that, on average, we reported weekly. And they were fine with that cadence."

Research from Advertiser Perceptions shows how important it is to gain rapid insights right now. Before the pandemic, US agencies and brand marketers spent an average of 4.2 months planning media, but in research conducted in April 2020, that timeframe was cut to just 2.3 months. Paid social media was typically planned 3.0 months in advance before the pandemic, but as of April it was being planned just 1.6 months in advance.

How Far Ahead Did US Agencies and Brand Marketers Plan Select Media Prior to the Coronavirus Pandemic?
months, April 2020

	Pre-pandemic	Currently
Linear TV (broadcast)	5.3	2.7
Out-of-home	5.2	2.6
Linear TV (cable)	5.2	2.7
Print magazines	5.1	2.8
OTT/connected TV	4.5	2.4
Digital video	3.8	2.0
National newspapers	4.3	2.6
Terrestrial radio	4.1	2.3
Display	3.7	2.0
Digital audio	3.6	2.0
Social media (paid)	3.0	1.6
Search (paid)	3.2	1.9
Ecommerce	3.3	2.1
Total	**4.2**	**2.3**

Note: mean months
Source: Advertiser Perceptions, "Coronavirus Effect on Advertising Report: Wave 3," May 7, 2020

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The speed of social listening is also a benefit compared with surveys or focus groups. Consumer sentiment changes quickly, and traditional market research studies can move only so fast.

"A lot of other places where we might get data, there's a lag time of a couple of days or even a month in some cases," Talerico of Merkle said. "Social listening is a great way to stay up to date on how people are feeling in the moment. If we see something spiking, we try to dive in and understand how that's affecting our business."

This real-time information is playing a critical role in helping brands navigate the pandemic. At Wells Fargo, it has "helped elevate a lot of the discussions early on in the pandemic and helped validate what we're seeing across our internal partners and in our channels," Wright said. "It's the way we want social listening to be used."

NO. 4: BRANDS CAN SHOW EMPATHY BY LISTENING

"Empathy" may be a buzzword in the marketing industry right now, but listening is one of the best ways to show understanding. Social listening helps the people who guide brand communications hear what their customers and would-be customers are saying.

May 2020 research by PepsiCo Beverages North America and Ipsos found that 91% of US teens and adults ages 16 and up considered it important for brands to listen to them, and 43% believed that one way brands can show empathy is by listening.

"What it comes down to is just being human and creating a true connection with your audience," said Jamie Gilpin, CMO of Sprout Social, a provider of social media management tools. "That has become not just a best practice for brands, it's become an absolute necessity. We're seeing our customers use listening around COVID-19 to understand where their audience is at, mentally, and what is going to be relevant to them right now."

Listening can help marketers figure out if the marketing messages they are putting out are hitting the mark. As Cole of Digitas put it, "It's important to get a reality check on whether the tone and message is correct and to adjust accordingly. A lot of brands are using listening for that."

Ultimately, it's not about listening more, but doing it more thoughtfully, according to Synthesio's Renganathan. "One of the things that the pandemic has done is helped folks get out of their routines when it comes to the ways they use social data," he said. "One of the best practices that marketers have embraced during this time is trying to listen better."

HOW MARKETERS ARE USING SOCIAL LISTENING RIGHT NOW

From identifying consumer needs to developing the right ad creative, social listening is helping marketers meet the challenge of marketing during a pandemic.

Identifying Consumer Needs

How should we shift our product assortment? When the pandemic forced a retail client of ad agency Merkle to close its stores, like many other retailers, it pivoted toward ecommerce. Merkle used social listening "to help the client figure out what types of products customers are looking for and what types of products they should be adding to the website as quickly as possible," Talerico said. Listening helped the retailer "understand what they should prioritize, how they should go to market with these new product categories, and what brands people are most interested in."

What are grocery shoppers comfortable with? When the pandemic began, grocery retailers had to quickly revamp their stores to address safety concerns. By using social listening, one grocery chain learned that it had to widen aisles so that people would be comfortable coming into the stores, according to Dan Freund, chief revenue officer at Brandwatch, a social intelligence platform vendor. In addition, the chain learned that consumers also cared about how it protected its staff. "The kind of protective measures they put in place for them actually impacted how comfortable their consumers felt coming to the store," Freund said.

Should we expand into luxury items or focus on staples? As shortages of essential products plagued the retail supply chain, one client of Synthesio was confronting a different issue. It had been planning to expand its marketing budget for meat-alternative products, but it wasn't sure whether that type of item was still relevant, or whether the message would fall flat. It used social listening to learn how consumer sentiment toward meat alternatives was trending.

"The question is, 'Are these sorts of somewhat-luxurious items relevant?' Do we need to keep talking about this? Or are less-complex things like flour and sugar—which people are buying a lot of and grocery stores are sometimes running out of—going to be part of the new normal?" Renganathan said.

What problems can we help solve? At Johnsonville Sausage, social listening has played an expanded role during the pandemic. In the past, the company used it to help develop creative and marketing messaging and to assist with product innovation. But now, "We're using it to listen more for external reasons," said Stephanie Dlugopolski, the company's senior manager of PR and social media. "So, how are people talking about eating at home? What problems do they have, because now they're cooking three meals a day when maybe they were cooking only one? And how can Johnsonville help that? We're listening for the new ways of life and the challenges people are facing."

How KitchenAid Used Social Listening to Reach Housebound Cooks

When the pandemic began, KitchenAid noticed an easy-to-spot trend: More people were cooking and baking at home. Some were doing it for the first time, others were pros. And many were looking for new tools and techniques to make home cooking easy and fun.

Using social listening, KitchenAid and its agency Digitas discovered that some people were using social media to share how they were using stand mixers and other implements to make things like bread, pasta and cookies. The marketer also learned that there was an increase in the number of people who wanted to learn more about cooking.

In response, the company launched #MakeItTogether, a global social-first campaign offering cooking challenges, recipes and ideas. The campaign used paid and organic content on Instagram and Pinterest, which included Stories, GIFs, games, stickers and recipes for cooking trends like whipped coffee and homemade pasta. It also used email marketing and user-generated content, as well as influencer partnerships and public relations managed by PR firm MSL.
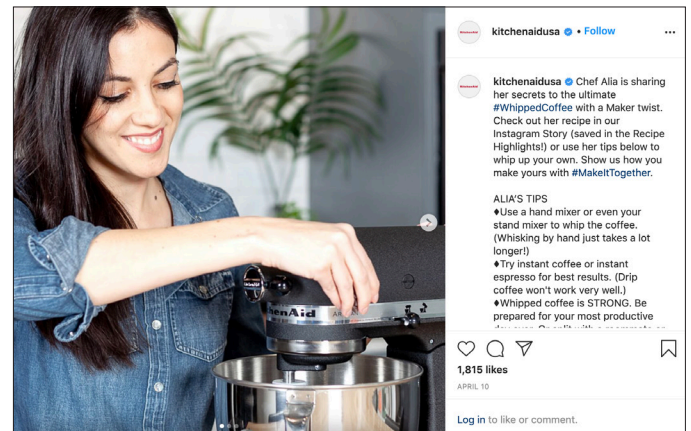
KitchenAid used social listening to "identify the most popular recipes, ingredients and genres of food people are making right now," Cole of Digitas said. It also used listening to learn what foods people were stocking up on, or were unable to find, so it could tailor the content to what was top of mind and relevant, she said.

Marketers often combine social listening data with search data, and KitchenAid did this as well. It incorporated real-time data from Google and Pinterest searches, which, among other things, showed a 13-fold increase in searches on Pinterest for how to make bread and a 250% increase in Google searches for "easy margarita recipe" on April 4.

Managing Organic Social Media

How can we more efficiently respond to consumers?
Many social media community managers have experienced increased comment volume on their brand profile pages during the pandemic. For instance, consumers are posting to ask about items that are out of stock or how to use a product. They're also commenting on their experience visiting a store that has recently reopened.

"We've seen higher engagement rates organically across all social platforms," McCormack of Havas Media Group said. Social listening is helping those managers categorize and respond to queries. "They can assign community management resources more efficiently, implement escalation processes, and create response templates for the most frequent questions that they're receiving," he said.

Tracking Sentiment

What will make people feel comfortable coming to a hospital? In the healthcare industry, understanding how people feel about coming to a medical facility during the pandemic is important. By using social listening in combination with other research methods, CommonSpirit Health, which operates hospitals in 21 states, was able to ascertain its patients' level of concern about contracting COVID-19 if they came to a hospital or clinic, and then developed marketing materials that addressed those concerns.

The company created a series of videos that showed what it's like to check into an ER, clinic or a maternity area, Viden of CommonSpirit said. In addition, it created a TV ad that ran across all of CommonSpirit's markets and uses the tagline "We're here when you're ready."

"We wanted to provide that level of comfort and familiarity to consumers at this moment," Viden said.

How are consumers and healthcare providers discussing COVID-19 along with specific diseases? The agency CMI/Compas sends its healthcare industry clients weekly reports, which show tracking of conversations and sentiment that include COVID-19 along with a range of conditions and diseases. One May 2020 report featured a discussion of how singer Nick Jonas, who has Type 1 diabetes, caused a spike in conversation related to the disease and COVID-19 when he posted best practices for other diabetics.

"We had a lot of brand leads come to us and say, 'Right now, we really need to understand the conversations even more fully than we ever had to, in order to continue to give our patients and healthcare providers the content they need,'" Aliaga of CMI/Compas said.

How are consumers' stay-at-home attitudes evolving?
At agency RPA, social listening has helped its clients understand changing consumer sentiment surrounding staying at home, ordering takeout and driving less. It helped them understand not only what messaging to use, but also who may be receptive to it and how often to send those messages.

"[Social listening tools] do a really fantastic job at data visualization," Dossett of RPA said. "We can put in a ton of different queries that allow us and our clients to see how people's opinions and perspectives are changing over time. Because it is a public and accessible data source, it gives us some really interesting, unprompted insight into what our customers may or may not be ready for."

At Pernod Ricard, Social Listening Goes All the Way to the C-Suite

Like every marketer, those at spirits company Pernod Ricard have had to make rapid marketing changes to make rapid changes in its marketing to address evolving consumer usage patterns during the pandemic. In this interview, Simon de Beauregard, engagement director for the Absolut, Malibu, Kahlúa and Smithworks labels, shared how social listening plays a role in those decisions.

How has your use of social listening changed in the past couple of months?

de Beauregard: My team has always done social listening and uses it as a tool to get the pulse of consumers—to know what's happening, what's trending.

Two things have changed in the past few months: We've done it a bit more, and we've shared it more. We still listen to our consumers, but now we listen to competitors more to see what they are doing on their channels.

And we've used it in the past two months to report all the way to the top management, to our CEO. We are showcasing that we can provide meaningful insights faster than traditional insights campaigns or surveys would do. I don't know how much they were aware of social listening before the pandemic. Management is more aware of it nowadays.

Why is social listening important for your brands?

de Beauregard: We have an insights team, and we do a lot of focus groups and surveys. But oftentimes there's nothing better than the true read on what the consumer thinks about your actions or your initiatives, whether it's creative or a new tagline, for example. And a few times we found that social listening was a faster and stronger way to get a read on something.

For example, back in March, it wasn't as obvious that consumers would be looking for new ways to entertain while doing a virtual happy hour. We learned that by using social listening. A month later, Nielsen was sending us data confirming that with hard numbers, but we had already pivoted our strategy. We were able to meet what consumers were needing in a big way because we knew how the pandemic was impacting behaviors and morale, and we needed to jump on it quick.

Another example is ecommerce. Ecommerce in our industry tripled, quadrupled, went crazy during the pandemic. Consumers told us loud and clear on the social platforms that they were going to have alcohol delivered, that they were going to purchase online. They were going to Drizly and others. And then it was confirmed by other studies. But we were way smarter by using social listening.

What are some of the challenges you've experienced with social listening?

de Beauregard: We use a social listening tool aggregator, and we have a pretty good read of the levels, trends and volumes of conversations. But we know it's limited for many reasons. Sometimes you miss a lot of what is not directly attributable to you. And some elements will not be accessible. Instagram Stories, for example, are more and more important for us. But we know they're beyond the limits of what we can do today with social listening.

Why is it important to not rely solely on a listening platform to gather social media insights?

de Beauregard: Using a tool like this gets you only 30% of whatever happens regarding your brand. We somehow need to capture the other 70%, or at least a fraction of the 70%. So, on my team we have two or three people actually going into the social platforms and trying to have a more manual read.

One good example is the trend of Dalgona [whipped] coffee. We saw it on TikTok. It's not something that's directly related to Absolut or Kahlúa, but because we had our ears open, we heard about it. We immediately saw that it was trending like crazy and that we had something to do with it, because a brand like Kahlúa plays with coffee. That was something we could leverage and translate into a piece of content. We acted pretty quickly on it across social and YouTube and saw amazing engagement.
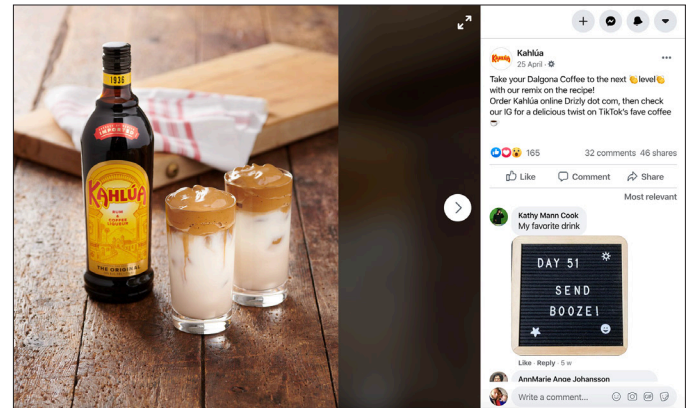
Will your use of social listening stay as high after the pandemic?

de Beauregard: It's hard to predict the future, and we were using it a lot before. But my guess would be that we will keep using it a lot. We are rediscovering that there is a lot in it, and that it is very, very valuable. I think it has proven again that it could be on the first page of the document we bring to the CEO as the truth. So, if anything, I think our usage is going to stay higher.

Crisis Management

What should I do when consumers react poorly to my business decisions? When one retail client of Adlucent reopened some of its brick-and-mortar stores, it seemed like it would be a positive thing. But instead, the client started to see negative feedback on social media. "A lot of its customers were like, 'We don't like that you have your people working in stores. It's not safe,'" Roussos said.

After Adlucent alerted the client to the comments, the retailer made changes. It shortened business hours, and its PR team developed new messaging focusing on the health of the company's associates. It also temporarily pulled back on digital advertising, even though the ads were performing well and driving traffic. "It chose to take money off the table and slow down revenues, because the company was worried about its brand positioning moving forward," Roussos said.

Such quick action wouldn't have happened pre-pandemic, he said. As with most of Adlucent's performance-driven clients, social listening was a secondary metric to things like sales, revenues, impressions and conversions. According to Roussos, "Pre-pandemic, if this particular client saw some type of negative feedback, I don't think it would have changed its message. The client would have said, 'Oh, it's the cost of doing business. We're fine.'"

Developing Marketing Creative

What are consumers' concerns, and how can we address them in our marketing? At CMI/Compas, clients want to know how to reposition their marketing creative so it answers questions that are coming up in social media, especially those surrounding the safety of getting treatments. "If you have an oncology brand or a multiple sclerosis brand, you know that patients still need to get their treatments. What are some of the conversations that are happening right now among patients? What are their fears? What do they need from us as brands? That is the type of conversation that we are seeing," Aliaga said.

How are consumers responding to my new creative? "A lot of brands are doing enhanced social listening around consumer reactions to their marketing right now," Cole said. "They will pull creative that is getting too negative of a consumer response, or they'll alter an image or a word if they receive justified criticism that it's not quite right in the current environment."

Tracking Competitors

How are my competitors handling the challenges of the pandemic? Brands are using social listening to compare their situation and their business decisions with others in the same category. "Are they reopening stores, are they offering new services, are they making charitable contributions, what are they doing for their employees— and does it seem to be working? There's a much larger consciousness of the decisions, day to day, that are happening between competitors in a certain category," Cole said.

PUTTING IT IN CONTEXT: THE STATE OF SOCIAL LISTENING

The resurgence of interest in social listening during the pandemic marks a pivotal time for the platforms and tools that support the activity. There have been many improvements since we last covered the topic in one of our reports four years ago, but there are also still challenges and drawbacks.

For marketers considering whether to invest in new tools or wondering how to make the most of them, here's a look at the state of social listening.

MOST MARKETERS LISTEN, BUT FEWER USE LISTENING PLATFORMS OR TOOLS

As previously mentioned, most marketers already do track what's said about their brands, company and/or industry on social media. But research conducted prior to the pandemic found that only about half of marketers used some form of social media listening and/or analytics tools.

According to December 2019 research by Talkwalker, a social listening platform, 48% of worldwide PR and marketing communications professionals used social listening or social media analytics tools.

PR and Marketing Communications Professionals Worldwide Who Use Social Listening/Social Media Analytics Tools, Dec 2019
% of respondents

Not sure 24%
Yes 48%
No 28%
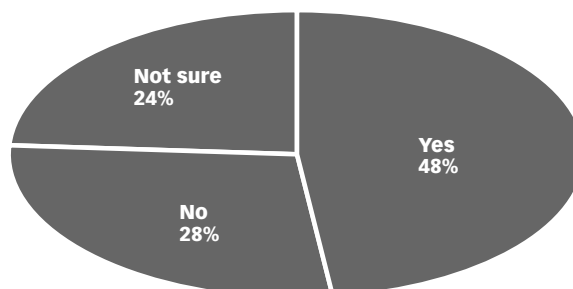
Source: Talkwalker, "Global State of PR," Feb 4, 2020
256373   www.**eMarketer**.com

Q4 2019 research by CMO Council and Catalina among retail marketers worldwide found that 51% used social sentiment analysis and conversation tracking to understand their customers' expectations and behaviors.

Methods Used by Retail Marketers Worldwide to Track Customer Expectations and Behaviors, by Level of Implementation, Q4 2019

% of respondents in each group

	Currently use	Planning to use	Not used
Focus groups (live and online) or customer advisory panels	46%	20%	34%
Online chats and feedback forms from our website	69%	13%	18%
Customer service/support conversations (online and via phone)	79%	11%	10%
Social media sentiment analysis and conversation tracking	51%	31%	18%
Shopper purchase data and insights via retail partners	52%	28%	20%
Shopper purchase data and insights via third party	31%	28%	41%
Consumer purchase data and insights via third-party panel	34%	23%	43%
Online behavior tracking	47%	18%	35%
Sales and consumption data from retail partners	66%	16%	18%
Industry intelligence from trade groups and analysts	70%	13%	16%
Promotions and sweepstakes redemptions	48%	18%	34%
In-store and point of sale surveys	38%	18%	44%
Sampling or taste-testing events or promotions	35%	17%	48%
Internal sales and revenue tracking	87%	10%	3%
Other	22%	11%	67%

Note: numbers may not add up to 100% due to rounding
Source: CMO Council, "Measuring Marketing in the Moment: Understanding How Shoppers React, Transact and Interact in Real-Time" in partnership with Catalina, March 31, 2020

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When it comes to using social listening specifically to track COVID-19 sentiments or trends, just 8% of worldwide marketing leaders polled by Gartner in March 2020 (a different study from the one cited at the start of this report) said they had deployed listening tools for this purpose.

What Operational Actions Have Marketing Leaders Worldwide Taken in Response to the Coronavirus Pandemic?

% of respondents, March 2020

Developed scenarios for planning purposes
38%

Paused or cancelled any long-term projects
34%

Changed customer policies
11%

Promoted ecommerce offerings
9%

Deployed listening tools to monitor customer COVID-19 sentiment or trends
8%

Note: n=362
Source: Gartner as cited in press release, May 14, 2020

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The difference between this low finding and the much higher one in the other Gartner study likely comes from the wording of the question and the environment in which the question was asked. This study asked whether respondents were using listening tools for a very specific reason—to understand COVID-19 sentiment or trends—and it was conducted via a traditional survey. The study cited earlier discussed the use of social listening platforms more broadly—to understand consumer preferences, habits and expectations in general—and was conducted during a webinar.

What these studies point toward is the fact that social listening tools have not penetrated into the list of must-haves for many marketers. In September 2018, Salesforce research found that 47% of worldwide marketers used social listening tools, and 39% were planning to within two years. If that had come true, nearly nine in 10 marketers would be using social listening tools today.

When Salesforce conducted similar research in January and February 2020, it didn't ask what percentage of marketers used social listening. Instead, it looked more broadly at social marketing tools (including listening) and found that 45% of those that used such tools were planning to increase use.

Part of the reason behind the slow growth in usage is that social analytics in general are less likely to be used by marketers than other forms of analytics. In Salesforce's research published in May, 58% of respondents were tracking social analytics in 2020, compared with 65% for sales effectiveness metrics and 70% for tracking revenues.

Marketing Metrics Tracked by Marketing Professionals Worldwide, 2018 & 2020

% of respondents

	2018	2020
Revenues	74%	70%
Sales effectiveness (e.g., funnel engagement, rep performance)	64%	65%
Web/mobile analytics (e.g., page views, time on page)	55%	62%
Customer satisfaction (e.g., CSAT, NPS)	60%	62%
Customer retention rates	59%	61%
Digital engagement rates (e.g., opens, clicks)	54%	59%
Social analytics (e.g., reach and engagement)	54%	58%
Marketing leads (e.g., MQL, conversion rates	55%	58%
Customer acquisition costs	51%	58%
Customer referral rates	52%	53%
Lifetime customer value	43%	48%

Source: Salesforce, "Sixth Edition State of Marketing," May 19, 2020
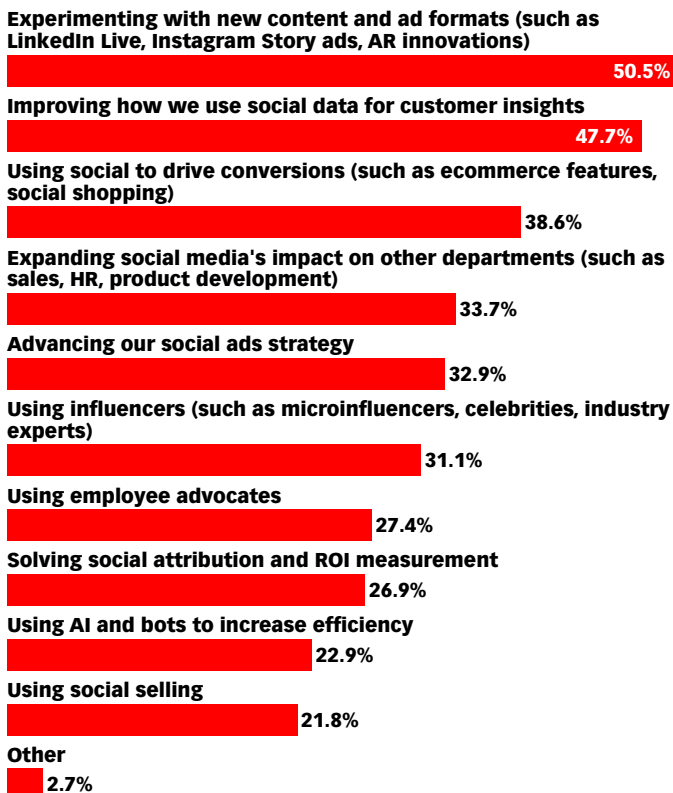
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It's not that companies don't want to make more of their social data—47.7% of worldwide marketers surveyed by Hootsuite in Q3 2019 said that improving their use of such data to gain customer insights was an exciting social media opportunity in 2020.

What Do Marketers Worldwide See as the Most Exciting Opportunity in Social in 2020?
% of respondents, Q3 2019

Experimenting with new content and ad formats (such as LinkedIn Live, Instagram Story ads, AR innovations)
50.5%

Improving how we use social data for customer insights
47.7%

Using social to drive conversions (such as ecommerce features, social shopping)
38.6%

Expanding social media's impact on other departments (such as sales, HR, product development)
33.7%

Advancing our social ads strategy
32.9%

Using influencers (such as microinfluencers, celebrities, industry experts)
31.1%

Using employee advocates
27.4%

Solving social attribution and ROI measurement
26.9%

Using AI and bots to increase efficiency
22.9%

Using social selling
21.8%

Other
2.7%

Source: Hootsuite, "Social Media Trends 2020," Dec 11, 2019
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Another factor impacting the perceived value of social listening tools is that listening is typically managed by those who work in social media. That can lead upper management to assume the results are best used for social media marketing.
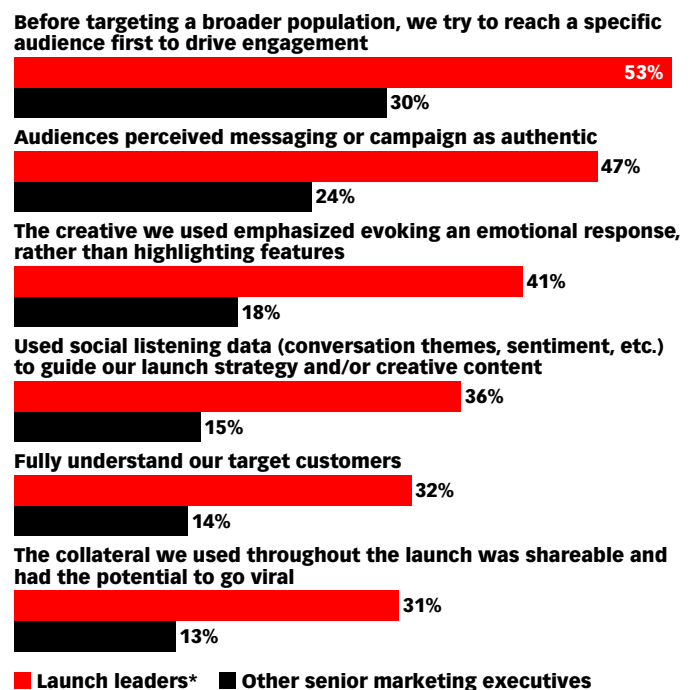
In Talkwalker and YouGov's Q3 2019 study of worldwide PR and marketing professionals, 56% of respondents said the primary users of social listening tools at their company were social media managers, 39% were data analysts, and 24% worked in research. Various PR roles also commonly used social listening. But just 14% of business directors and 8% of C-suite executives used it.

It's also true that many marketers still focus their social listening activity on basic functions or activities, rather than using it to inform larger decisions. "There's a lot of people doing what we call light listening, but that doesn't necessarily give you actionable insights that actually drive where you're going to take a product, what product you're going to develop, what campaign you're going to run," Brandwatch's Freund said.

When it comes to launching a product, feature or campaign, just 15% of US marketing executives used social listening data to guide strategy or creative content, according to May 2019 research by Bain & Company. Even among those who Bain defined as "launch leaders"— the top 15% of respondents who reported financially successful launches—just 36% used such data.

Attitude of US Launch Leaders* vs. Other Senior Marketing Executives About Their Approach to Launching a Product, Feature or Campaign, May 2019
% of respondents

Before targeting a broader population, we try to reach a specific audience first to drive engagement
53%
30%

Audiences perceived messaging or campaign as authentic
47%
24%

The creative we used emphasized evoking an emotional response, rather than highlighting features
41%
18%

Used social listening data (conversation themes, sentiment, etc.) to guide our launch strategy and/or creative content
36%
15%

Fully understand our target customers
32%
14%

The collateral we used throughout the launch was shareable and had the potential to go viral
31%
13%

■ Launch leaders* ■ Other senior marketing executives

*Note: n=650 who answered 5 on a scale of 1 to 5 with 1=does not describe at all and 5=describes completely; *defined as the top 15% of respondents who reported financially successful launches*
Source: Bain & Company, "Let's Do Launch: The 5 Best Moves for Your Marketing Launch Playbook" in collaboration with Twitter, Sep 23, 2019
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But as the pandemic-related use cases described above show, social listening can support a wide range of marketing activities.

"We have clients for whom we do social listening regularly, and we don't manage their social media programs," Talerico of Merkle said. "We still do social listening because it provides so many valuable insights."

At Wells Fargo, there is a significant distinction between social listening, which informs all of marketing, and social care, which monitors consumer conversations and responds to issues, comments and complaints.

"Our social media listening function is aligned with marketing and the customer," Wright said. The company uses it to "understand what customers are talking about, their voice, what's important to them and what their mindset is."

FOUR WAYS SOCIAL LISTENING TECHNOLOGY HAS IMPROVED

Several advances in technology support the use of social listening tools for broad marketing goals. Among them are:

- Quicker trend spotting and analysis through **artificial intelligence.**

- The ability to ask and answer **deeper questions.**

- **Better integration** with other data sets.

- Improved **image and logo recognition.**

Artificial Intelligence

AI's application application in social listening is significant. Within the past few years, most vendors of social listening tools have incorporated AI into their platforms to deliver more actionable reports and insights with less need for manual analysis.

AI will speed up the return of listening results and enable Wells Fargo to move faster, according to Wright. "An analyst won't have to go in and put keywords in or string together a long Boolean search," he said. "The system is going to start prompting: 'Hey, is this something that's interesting? Hey, I think this is related to this. Can you verify that?' Humans will still be part of the picture, but the machine is getting smarter to close the gap and accelerate things."

AI also helps to automate the process of building sets of keywords and inputting them into a listening platform, making it less labor-intensive.

"Even two years ago, many of the platforms that were available were super robust, but also very complicated," Gilpin of Sprout Social said. "You needed an analyst or even a data scientist to go in and set up the query, or a really talented agency to help you do that. Now we have tried to create a platform with better usability and ease of adopting it."

Deeper Questions

Incorporating AI into the listening process has also enabled marketers to ask deeper and less specific questions, and to use the information to inform much more than social media strategy.

"The questions are getting much more oriented toward 'How do I map my customer journey?' vs. 'What's the sentiment this month vs. last month?'" Synthesio's Renganathan said.

AI helps in several ways: by analyzing and making sense of unstructured text, by finding patterns in thousands or even millions of social media conversations, and by organizing the information so that it's easier to use.

At the same time, marketers can now listen for much more than what's directly related to their company or brand. It's possible to look for cultural trends, gauge consumer mindset and understand how attitudes are shaped by social media conversation.

"It's a lot more common now for brands to do consumer-based listening or culture-based listening that is more oriented toward trying to spot the next big meme, an emerging consumer trend or anything that would allow them to take an action that's bigger than a reply," Cole of Digitas said. "Whether that's a whole campaign, a shift in positioning or even a new product offering, I think the appetite has really grown for social listening as an input to that sort of thing."

The key takeaway here is that marketers can now be proactive rather than just reactive in social media.

"We're seeing people do broad-based categorical research, such as 'How are people talking about meat alternatives?'" Renganathan said. "But then instead of saying, 'We've had a campaign. Let's monitor its success,' they say, 'How do we talk to the people who care about this stuff so that it is informing the strategy rather than being reactive?' Companies are trying to be proactive, using social data as the input."

Better Integration

These days, social listening is rarely a standalone offering from vendors of marketing technology or analytics. It's more likely to be embedded in a suite of products.

At Sprout Social, listening is one feature of a full social media management package that also includes tools for publishing, engagement and analytics.

Brandwatch, whose company heritage is in social listening, now markets a range of consumer intelligence services, including real-time surveys, influencer analysis and content marketing analysis.

Synthesio markets itself as a "social media intelligence" firm combining social listening and audience insights. As a unit of Ipsos, Synthesio can bring in the market research firm's proprietary data analytics tools to help mine social data.

Having the right combination of analytics will provide, as Havas Media's McCormack put it, "the big picture of what's happening in consumers' lives."

And since social media usage is just one aspect of a consumer's life (albeit an important one for many people), being able to pair data about how consumers talk in social media with data about things like how they find brands, how they purchase, and how they are influenced can make a marketer only smarter.

"Something that we've talked a lot about over the past couple of months is how we bring all of these data points together, both social and nonsocial, to understand the full picture of patient journeys and healthcare provider journeys," Aliaga of CMI/Compas said. "A survey may be a little bit more polished, whereas on social, it may be a little more raw. When we are looking to create marketing plans for our clients, it's important to know all of the ways in which the same audience is talking."

Image Recognition

In the past, social listening was primarily about gathering and analyzing written text. But as social media has become more heavily oriented toward images, the ability to recognize what's in those images, such as a brand's logo, icon or spokescharacter, is important. Advances in technology have made it much easier for listening tools to find and interpret social conversations that involve images.

At the most basic level, marketers can monitor their reputation and be alerted if their brand imagery is being used in a negative context. They can also understand when their brand image is used in a positive way, potentially helping PR goals. In addition, there is potential to analyze more challenging types of images, such as memes, though executives cautioned that interpreting memes correctly often also requires a human touch.

Agencies like Havas are finding more success with social listening that tracks images in addition to keywords. "In some cases, we've been able to identify 50% or 60% more relevant social posts just by tracking a brand's logo," McCormack said. "We're able to home in on the different types of emotions and creative elements within an image to try to understand which ones really drive engagement and resonate with people."

SEVERAL CHALLENGES HOLD BACK GROWTH

When social listening platforms were newer, there was a lot of excitement about what they could do. For some, that initial enthusiasm has been tempered by the fact that some of the challenges that existed in the early days are still roadblocks today, and newer ones have since cropped up.

- It's impossible to listen inside of **nonpublic social media and messaging,** and Twitter is still a primary data source.

- **Video** is difficult to analyze.

- Some types of listening still need to be done **manually.**

- Social media conversations **don't provide the full picture.**

- **Determining return on investment (ROI) is not clear-cut** and is often based on softer metrics.

Lack of Access to Some Platforms Leaves Brands in the Dark

The fact that social listening tools can't access nonpublic conversations inside of Facebook, Instagram, Messenger, WhatsApp and others is a huge gap and has been for several years. While public conversations on Facebook and Instagram can be gathered and analyzed, as well as engagement with a marketer's posts or on its profile page, any conversations that aren't public, including those within groups or on messaging platforms, are off-limits.

"Although the body of data in general has grown, the proportion of that data that is not indexable has grown larger in that time too," Cole of Digitas said. "Dark social and messaging are much more a part of people's usage of social platforms than they used to be."

That has kept social listening platforms heavily reliant on Twitter, where posts are much more likely to be public.

"With most tools, Twitter still remains the dominant source of volume and quantity of conversation," RPA's Dossett said. "The insights you can extract from Facebook, Instagram, or even some of the new emerging platforms that are gaining scale, like TikTok or Giphy, are not at that same level of data, and certainly not at the same level of breadth that is accessible on Twitter."

The problem with relying on Twitter is that although the user base is highly vocal and engaged, it's also small. Twitter will have 53.5 million monthly users in the US this year, according to our forecast, representing just 18.5% of internet users.

"We're seeing a lot more conversation on Instagram than we ever have before, as well as on YouTube and now LinkedIn," Johnsonville's Dlugopolski said. "The challenge is there is a limited number of tools to help you get to those conversations."

And because the social listening platforms don't all track exactly the same list of properties, some marketers feel they need to use more than one tool. According to Talkwalker's research, 49% of marketers in North America who used more than one tool did so to gain access to different data sources, while 46% said it's because the tools have different offerings, such as influencer analytics or media coverage.

One plus is that the listening platforms can now listen to conversations on reddit. Communities on reddit "are very rich; the depth and the quality is extremely high," Wright of Wells Fargo said. But reddit has an even smaller social media presence than Twitter, with just 34.1 million US logged-in users this year, according to our forecast.

To get around these limitations, marketers and agencies should:

- **Be aware of the demographics and psychographics of the social media user base.** "That will mean understanding the types of behaviors that are happening on different platforms and using that to inform a cross-platform strategy that's meaningful to consumers," McCormack of Havas Media Group said.

- **Not assume a subset equals the whole.** "We've had to be really careful about how we draw information from social listening and that we don't fall victim to overextrapolation, where we look at what is very clearly a smaller subset of the total audience, the vocal minority in most cases," RPA's Dossett said.

Video Is Difficult to Analyze

Another big hole is that the majority of social listening platforms have not kept up with the explosion of video in social media, and their ability to listen inside of massive properties like YouTube, as well as up-and-coming properties like TikTok, is limited.

Talkwalker is one of the few that do offer the capability; in 2019 it started offering a video recognition feature, capturing logos and brand images in videos posted online. It claims to analyze 150 million images and videos per day with a 30,000-logo database.

Other than that, listening tools are left to track text elements associated with videos. On YouTube, for example, it's possible to capture brand names in video descriptions, channel description or comments, but not within the actual video. TikTok presents a different set of issues; it has not developed an application programming interface (API) for social listening platforms to connect to, meaning that listening for trends there is a completely manual process (see the next section for more on that).

One challenge for listening within videos is their complexity. The combination of visuals, sound and text makes them massively complicated for today's analytics tools to process. That's why listening platforms like Talkwalker have focused on finding easy-to-recognize brand imagery. And that's also why doing deeper analysis of tone and sentiment is challenging.

Until there's the ability to do things like splice video into individual frames, or to use AI to decipher the meaning behind a video, this is an area where marketers will have limited visibility.

That means marketers should:

- **Glean as much as possible from video descriptions and comments.** Sometimes the text can reveal important insights and can be enough to alert a team to watch the video to learn more.

It's Still a More Manual Process than It Should Be

Even though listening has gotten smarter because of things like AI, most of the executives we interviewed said that there's still too much that needs to be done by hand, whether it's staffing people to input queries and review reports, or the need to do old-fashioned searching and sleuthing to uncover important insights in places that can't be tracked with listening platforms.

Adlucent's Roussos said some clients have put more internal resources toward listening, and others have assigned a full-time person to do some of it manually. "Even though it's a manual process, they feel like it's important," he said.

The same is true at Pernod Ricard. "Using a tool like this gets you only 30% of whatever happens regarding your brand," de Beaureagard said. To help capture more of the rest, the marketer assigns its own staffers to go into the social platforms to read, watch and learn.

Tracking trends within TikTok is also largely a manual task, since social listening platforms don't yet operate there. That's how Pernod Ricard latched onto the Dalgona coffee trend. Stories are another area that marketers will need to monitor on their own, such as by following influencers that are important to a brand.

Marketers can manage these issues by:

- **Acknowledging the reality.** Unfortunately, the labor-intensive aspect of social listening isn't going to go away with the current state of the tools and what they can and can't track. Acknowledging that hurdle and being willing to devote the right resources to it are important.

- **Refining keyword lists.** One ongoing headache is maintaining the right keywords to use in searches. Often, marketers will use a "set it and forget it" approach, thinking that that will lead to less work and more automation. But that strategy can backfire if the results that come back aren't accurate, or if certain trending words are no longer relevant. It may seem counterintuitive, but marketers should regularly revisit their keyword list to make sure the keywords they use are still appropriate (and that there aren't new ones that have popped up and aren't being tracked.

For Some, It Still Seems More Anecdotal than Essential

Parsing through the insights that come from social listening can sometimes yield essential information that can change a business decision or put out a fire before it erupts into viral social media frenzy. Other times, what turns up is difficult to assign meaning to.

In addition, while many consumers discuss brands they like in private settings, few use social media to publicly complain about brands. According to July 2019 research by Selligent, when internet users in Europe and North America wanted to resolve an issue, they typically contacted customer service or tried to troubleshoot by searching online. Well under 10%, no matter the age group, said they would publicly complain on social media.

How Do Internet Users in Europe and North America Prefer to Resolve an Issue with a Product/Service?
% of respondents, by age, July 2019

	18-24	25-35	36-54	55-75
Contact customer service	48%	56%	62%	67%
Find information online and troubleshoot/fix the issue myself	39%	31%	27%	22%
Abandon the brand altogether	8%	8%	8%	10%
Publicly complain on social media	6%	6%	4%	2%

Source: Selligent, "Global Connected Consumer Index," Sep 24, 2019
250036   www.**eMarketer**.com

The challenge is that social listening tends to bring that vocal minority to the forefront, and marketers must decide when and how to pay attention.

"In the early days, social listening was viewed as this bottomless treasure trove of raw, unfiltered consumer insights. In a lot of ways, that has some truth to it, but there's still a distinction between what people will type out and share vs. the full spectrum of their experience," Cole of Digitas said. "It's important to interpret social listening data with that frame. It can be very important, but it's not the only important thing."

Early in the evolution of social listening, such learnings were much more valuable and weighted more heavily, Dossett of RPA said. "Now, for the most part, we're using it as smart, complementary color to information or insights we're gathering elsewhere."

Even among those who are strong proponents, there is the recognition that social listening's purpose is not to deliver a final verdict, but to provide first warning of a trend or issue, or early support for a hypothesis.

"We use social listening to start to understand issues we need to dive into a little more deeply," CommonSpirit's Viden said. "But it's no substitute for research to really drill down into to the consumers you're trying to attract and retain. What you see in social listening is just the tip of the iceberg, and what's underneath the water could be very different from what you're seeing on the surface."

The key tip here is to:

- **Pair social listening with other tools.** It can be an early warning of a problem, or a leading indicator that can start a marketer down a path toward a new product or marketing angle. But it's also essential to back up what you're seeing with other forms of research. As described earlier, KitchenAid used search data and social listening together to develop its #MakeItTogether campaign. And Pernod Ricard confirmed the trends it was seeing with Nielsen data.

ROI Is Hard to Measure

Whether a marketer uses a social listening platform or relies on an agency to provide listening services, there is a cost involved. And ROI isn't always easy to quantify.

"Social listening doesn't provide a true ROI metric," McCormack of Havas Media said.

Although obtaining actionable insights has gotten easier, the role that listening often plays as a bellwether means that it's easy to point to it as the "a-ha" behind a crucial decision but more difficult to show its worth on an ongoing basis day in and day out.

One way marketers are doing that is to push the insights outside of the social media team to others within the organization. At Johnsonville Sausage, knowing the success of social listening is related to "whether we can get the data and the insights to more people on our team, outside of social marketing," Dlugopolski said. That means "sharing these insights with our innovation team to say, 'Hey, we really should be looking at X product or X flavor profile.'"

Like other types of analytics, having the support of upper management is crucial. Most CMOs didn't come up the ranks through social media management and don't have firsthand knowledge of how social listening works or what value to extract from it. There's also the issue that many still believe its primary use case is to support social media activities.

"If you don't have a strong strategy at the top [of the executive team] and really understand the questions you are trying to answer, it's difficult to show ROI," Sprout Social's Gilpin said. "For companies that don't have that honed, [social listening] is not necessarily going to be a driver or a huge input to the strategy."

Unlike media mix modeling, where investments can be measured in a very scientific way, social listening is "more anecdotal," Viden of CommonSpirit Health said. "I don't know that I could put a number on it, but I do know the value of it. It's the value of being able to quickly respond to something, to magnify something that's a positive, and to neutralize and address something that could be a real negative."

Showing ROI means:

- **Not focusing on vanity metrics.** Emphasize findings that have true meaning, such as metrics related to sentiment, consideration or purchase intent, and those that can predict future behaviors. Spend less time simply tracking mentions, follows and comments and adding them up.

- **Learning what matters to senior management.** Figure out the metrics they are focused on and fine-tune your listening techniques to support those.

WHAT'S NEXT FOR SOCIAL LISTENING?

The pandemic has brought heightened awareness to social listening. But how will marketers use it after the pandemic? Will their interest remain elevated?

Based on our interviews with agency and brand executives, and the deeper ways they are using social listening right now, we believe the answer is yes.

- "I do think it's going to continue after this. **Next to in-person focus groups, there's really no better research** than being able to really dissect raw conversations that are happening on social."
—*Aliaga, CMI/Compas*

- "I imagine **clients will care a lot about social listening throughout the rest of the year.** Election season is coming up, and it's going to be a huge factor. 'Will there be a second wave of COVID-19?' is the question a lot of people are asking. There's going to be a lot of uncertainty throughout the rest of the year, and it will be important to keep a pulse on what's happening in real time."—*Talerico, Merkle*

- "We are rediscovering that there is a lot in it, and that it is very, very valuable. **It has proven again that it could be on the first page of the document we bring to the CEO as the truth.** So, if anything, I think [the use of social listening] is going to stay higher."
—*de Beauregard, Pernod Ricard*

- "The more turbulent times are, it's just natural that people focus on it. But I do think it's going to be a wake-up call. This is going to be **something that brands are going to have to invest more in."**—*Roussos, Adlucent*

- "The pandemic has, in some ways, helped clients understand **the true value of social listening."**
—*McCormack, Havas Media*

It's true that the pandemic has created a unique environment where the need for rapid insights is high. That will decline when marketers feel they are able to return to normal campaign planning. And similarly, we expect that consumers' currently heavy usage of social media will abate as the second half of the year goes on.

But as the social justice protests in the wake of George Floyd's death have demonstrated, the need to pay attention to how consumers use social media to express their feelings—even when they don't directly relate to a brand or product—is a necessity.

And when the pandemic has ended (if and when that comes), there will be new questions to answer via social listening:

- **How well did my brand survive the crisis?** With so many marketers in reactive mode right now, moving as quickly as they can, the post-pandemic period will be a time of reflection. The need to understand the impact of all those actions on brand health will be great.

- **Which pandemic-related consumer trends are sticking around?** The post-pandemic era will also be a time to refocus on broad consumer trends that a brand can attach to and determine if the ones a brand latched onto during the pandemic are still the right ones, longer term.

- **What types of marketing messages resonate with my customers and would-be customers?** After living through shutdowns, stay-at-home orders, lost jobs and more, many people will be shell-shocked and fragile. When they use social media publicly to discuss how they feel and how their lives are different, listening to those conversations will help businesses develop marketing messages that match their need state.

Finally, because social listening has played an important role in helping companies make large business decisions during the pandemic, that may help it finally achieve more prominence in the analytics mix.

"The insights we can pull around qualitative creative performance, qualitative behavioral psychology insights—they have proven themselves to be not only accessible, but also valuable in this pandemic," RPA's Dossett said. "We've gotten better about how we use social listening tools, not for vanity metrics or insights, but for really actionable information that provides a jumping-off point for future research and analysis."

KEY TAKEAWAYS

- **Marketers are turning to social listening more often during the pandemic.** It's helping them obtain critical real-time information to make rapid business decisions.

- **The questions it can answer are far more substantive than "What's my next social media post going to be?"** Companies are using it right now to identify consumer needs, track changing sentiment, manage negative feedback, and test and develop marketing creative.

- **Social listening has improved in recent years.** AI capabilities now allow marketers to ask (and answer) deeper questions; image recognition has gotten better; and there is better integration with other types of analytics.

- **It's still not a perfect tool, but right now its value outweighs the drawbacks.** The listening platforms have blind spots, including video, Stories and TikTok, and it still takes some manual effort to capture what they miss. However, when social listening helps a marketer spot a trend (or a problem) before it gets big, that is a huge benefit.

EMARKETER INTERVIEWS

eMarketer was founded on the idea that multiple sources and a variety of perspectives will lead to better analysis. Our interview outreach strategy for our reports is to target specific companies and roles within those companies in order to get a cross-section of businesses across sectors, size and legacy. We also look to interview sources from diverse backgrounds in order to reflect a mix of experiences and perspectives that help strengthen our analysis. The people we interview for our reports are asked because their expertise helps to clarify, illustrate or elaborate upon the data and assertions in a report. If you would like to be considered for an interview for one of our reports, please **fill out this form.**

Julie Hurvitz Aliaga
Senior Vice President, Social Media
CMI/Compas
Interviewed May 26, 2020

Liz Cole
Vice President and Group Director, Social Strategy
Digitas
Interviewed May 26, 2020

Simon de Beauregard
Engagement Director, Absolut, Malibu, Kahlúa and Smithworks
Pernod Ricard
Interviewed May 28, 2020

Stephanie Dlugopolski
Senior Manager, PR and Social Media
Johnsonville Sausage
Interviewed June 19, 2020

Mike Dossett
Vice President and Director, Digital Strategy
RPA
Interviewed on May 21, 2020

Dan Freund
Chief Revenue Officer
Brandwatch
Interviewed May 28, 2020

Jamie Gilpin
CMO
Sprout Social
Interviewed May 21, 2020

Ross McCormack
Director, Social Strategy
Havas Media Group
Interviewed May 21, 2020

Vijay Renganathan
Vice President, Global Solutions
Synthesio
Interviewed May 20, 2020

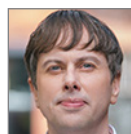**Jason Roussos**
Senior Vice President, Strategy
Adlucent
Interviewed June 8, 2020

Janie Talerico
Director, Media Strategy
Merkle
Interviewed June 8, 2020

Mark Viden
Senior Vice President, Brand
CommonSpirit Health
Interviewed June 15, 2020

Brian Wright
Social Media Listening and Intelligence Leader
Wells Fargo
Interviewed June 4, 2020

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