

Social Intelligence Trends and Tool Selection Guidance

Prepared by the 4A's Social Media Committee

Released April 2016

This report is confidential and for the private use of member agencies only. It should not be shared with third parties. All publication rights reserved.

Author's Note: Data is based on a 2015/2016 survey conducted by the 4A's Social Media Committee. Members are from agencies of all sizes and actively play a lead role



in managing or leading social media for their respective organization. Member agencies who responded to the survey include: SapientNitro, 360i, Havas Worldwide, Momentum Worldwide, Leo Burnett, SMG, Roberts Communications, Catalyst, VML, MEC, McCann, Bolin, Grey, Nail Communications, Digitas Health, Energy BBDO, Allen & Gerritsen, Crosby Marketing, OMD, Periscope, BigBuzz, Bandy Carroll Hellige, Lindsay, Stone & Briggs, and BSSP.

A publication of the 4A's
1065 Avenue of the Americas, New York, NY 10018
Main: (212) 682-2500
Email: publications@aaa.org
Website: www.aaa.org

Copyright 2016
American Association of Advertising Agencies

All rights reserved. No part of this publication may be reproduced or transmitted by any means – electronic, mechanical, photocopying, recording or otherwise— without written permission from the 4A's.

Social Intelligence Trends and Tool Selection Guidance

The Growing Demand for Social Intelligence

With 2.2 billion active users globally, up 8.7% over 2014 (*We Are Social, Global Digital Statshot Report, August 2015*), the proliferation of social media has given marketers access to more data than ever before.

This ubiquity has made social intelligence tools increasingly more valuable, and has given rise to a demand from marketers for more access and deeper insights. As a result, tools that have typically served one focused need (like social conversation listening, social channel publishing and response, or social media analytics) have evolved from single offerings to robust, multi-tool platforms.

However, with hundreds of marketing software and SaaS companies to choose from today - each with varied features, service offerings and pricing - the landscape has become fragmented and complex. This guidance paper aims to help agencies big and small better navigate, evaluate and select the right social intelligence tool or set of tools for their specific organization and needs.

“Our biggest thing now is speed to insight. How quickly can we do simple search strings that help us develop a picture of how the people are, and what they care about beyond the brands they mention? How are they connected to other people in a network? How does the tool help us understand these relationships?”

— *Michael Leis*
Senior Vice President, Social Strategy, Digitas Health LifeBrands

What’s Inside

Section 1: What to Look for When Evaluating Social Intelligence Tools

Section 2: Which Social Intelligence Tools to Consider

Section 3: Auditing for New Social Intelligence Tools

Section 4: Predictions and Trends

Section 1: What to Look for When Evaluating Social Intelligence Tools

With billions of conversations and content being shared across social media daily, social intelligence tools have enabled marketers to not only listen and engage - but also provide deeper insights, such as uncovering consumer needs at different stages, presenting opportunities for conversion and acquisition, informing real-time or more personalized content creation, or driving broader business intelligence and transformations.

As you look to identify the right social intelligence tool, it's important to not only evaluate the level of expertise it will provide for you and your stakeholders' goals, but also to select a partner that will collect the right data to help cultivate the right insights. Whether your organization is big or small, or handles social media marketing directly or indirectly for clients, the following criteria are important:

1. Conversation Sources & Partner Platform Access

The social web is vast, so it's important to get a full picture of the conversation and content happening across all relevant social channels. As a standard, most social intelligence tools today capture public conversation across blogs, forums, news sites, Twitter and YouTube. But choose a tool, or use a combination of tools, that can tap into all of the specific social channels you are looking to gain insights from - especially across more visual channels such as Tumblr, Pinterest and Instagram. Look specifically for the few tools that now have access to Facebook topic data, and ask specifically which media and data sources the tool monitors. If your needs span globally, look for a tool that supports the languages you require. Ask what the vendor's capabilities are around multi-language, NLP (natural language processing) and sentiment analytics, and whether queries are looked at in context. Some tools offer capability down to the sentence level.

“Before starting a search for a social intelligence tool, clearly define your goals. Are you looking to evaluate brand mentions within the context of the full social landscape, or are you more focused on drilling into one topic at a time to show the pivot points within that conversation? Similarly, is your priority to find like-minded user-generated content to share on a specific brand's social media channel, or are you focused instead on customer service response across the web? Asking these questions up front are key to finding the right tool for your needs.”

— Lindsey Goebel

Director, Social Media & Content Marketing, Crosby Marketing

Key Takeaway

Smaller organizations should look for:

- Capability around the most valuable social channels for your needs
- Solid automated capabilities if little manual research is available
- Ease of use with the tool if non-social experts will be using it

Larger organizations should look for:

- Full breadth of social channel landscape
- Multilingual support
- Preferred vendor partnerships with newly opened APIs, such as Pinterest and Instagram
- Global scale for multi-market use

2. **Reporting & Real-Time Data**

With access to so many conversations and data points, being able to aggregate analytics into a single, specific view will help you understand larger themes, trends and insights. It can also help make it easier for recurring or frequent needs and requests and to populate meaningful reports for key stakeholders. The more clearly the data is delivered, the easier it will be to act on. Look for a tool(s) with advanced dashboard generation and reporting, as well as vendors with capabilities to also track and visualize data - particularly in real-time. Ask how often the tool's database is re-indexed to ensure you are receiving the most up-to-date conversation pulls. Prioritize "future thinking" vendors who are also capable of incorporating the data into CRM.

“We find consistent data source to be of primary importance. We look for tools that best organize and analyze conversations to proxy for consumer perceptions as well as solutions that give us a deeper understanding of who is talking about the audience and real-time conversation monitoring.”

*— Lynn Sladowski
Partner, Senior Director, Social Media, MEC*

Key Takeaway

Smaller organizations should look for:

- **Ease of use for understanding and generating reports**
- **Auto-generated reports and “quick views” of data**
- **Customer service teams that can help you along the way**

Larger organizations should look for:

- **Advanced analytics**
- **Ability to export data available via API for advanced use, like custom dashboards or broader reporting needs**
- **Custom features, such as benchmarking and robust tagging capabilities**
- **Real-time and historical data views**
- **Complex data analysis around paid, owned and earned**

3. **Engagement & Conversation Management**

Today, it's not just about the ability to monitor conversations in social media and across social channels - but to engage and interact as well. Many vendors are adapting their tool, technology, product offering and overall capabilities to solve for this. Multiple social intelligence tools today now combine monitoring and listening, as well as response and publishing (and reporting). Look for tools that alert you to conversation as it's happening (especially for crisis management or opportunistic events and moments for real-time marketing). Prioritize tools that also have the ability to assign conversations to teams or individuals and to respond directly to all within the platform.

“The social suite has become a place of consolidation. Here, we find the integration of listening or monitoring products into the social media management service. For example, Sysomos + Expion, Radian6 + Social Studio, Mass Relevance + Spredfast, Vocus + Cision. In these cases, the listening and monitoring are well integrated into the planning, analytics or insights.”

*— Peter Fasano
Global Consulting Principal, Digital Strategy, OgilvyRED*

Key Takeaway

Smaller organizations should look for:

- **Operational efficiencies for replacing manual community management or content publishing**
- **Ability to monitor competitor conversation**
- **Robust local/regional conversation moderation and response capabilities**

Larger organizations should look for:

- **Complex workflow management and task assignments**
- **Centralized, multi-platform publishing**
- **Influencer identification and in-platform outreach**
- **Capability for listening and real-time opportunistic marketing**

4. **Cost & Pricing Models**

Depending on your organizations' needs, managing multiple social intelligence tools can add up and become costly. It's important to understand how the tool is priced and the type of contract you are signing up for. For example, most tools offer subscription-based pricing and a one-time license, while others offer open-source costs. Pricing models can vary by number of mentions, number of social channels you are tracking or even historical data needs (if you are looking to go further back in time for conversation pulls). Many vendors offer "business" and "agency" models, given each type of organization's varied needs. Be sure to ask the benefits of each model and accompanied pricing. With the rising demand, and as social intelligence tools become a standard in organizations (whether you are managing social directly or not), prices are on the rise. On average, costs can range anywhere from \$500 to \$70,000+ per month. Higher-cost tools offer unlimited topics, queries and "seats" for multiple clients or brands - which can be more efficient in the long run. Book demos with a range of the top tools so that you can start a relationship with the one that suits most (if not all) of your needs. Be mindful to not sign an exclusive agreement for one tool. The social intelligence landscape is rapidly changing, and it's easy for a vendor to be left behind as frequently as updates occur. Look for vendors who have flexible contracts and "try-before-you-buy" options.

"We no longer purchase our own licenses since clients can get better pricing through enterprise sales reps, and it allows us to be platform agnostic and integrate into all of our clients' CRMs."

*— Nathan Eide
Emerging Media Director, Bolin Marketing*

Key Takeaway

Smaller organizations should look for:

- **Tools with "freemium" features and the ability to upgrade over time**
- **Flexible pricing and short-term contract commitments**
- **Competitive agency pricing for multiple brands/seats**
- **Ask your vendors to discuss their projected release schedule for new features, or how frequently major platform functional changes should be expected.**

Larger organizations should look for:

- **Competitive enterprise or group agency pricing**
- **Models with unlimited seats to support multiple clients and high influx of new business needs**
- **Price efficiencies cross-market for global needs**
- **Holding company/agency group discounts**

5. **Ease of Use & Innovation**

Many aspects of social media require marketers to monitor, listen and engage on the go. Best-in-class social intelligence tools now offer the ability to access their tool and features not only through the web, but also through iPhone, iPad, Android and mobile web apps. Additionally, some tools are designed to be more self-serve, whereas others are built with a higher level of service and training, especially for larger organizations or those with multiple stakeholders or groups. Many vendors today offer phone support, video tutorials and in-person demos to help educate and train your organization on an ongoing basis. The quicker social channels advance, the faster social intelligence tools will evolve and progress. So it's important to develop an ongoing relationship with your vendor and to have up-to-date knowledge and access to its product roadmap and any beta opportunities.

“The best social intelligence tools are the ones that don’t just give us all the capabilities we need to do our jobs well - but have a thought-through user experience to their product and great customer support, and are providing continuous fresh strategic insight. The social and content landscape is evolving and growing faster than ever. And, it’s clear which companies can’t keep up, and which are leading and innovating at the pace of maturity. As marketers, you never want to find yourself on the wrong side.”

— *Stevie Dove*

Director Social Media, North America, SapientNitro

Key Takeaway

Smaller organizations should look for:

- **Set up and ongoing training**
- **Strong customer support team**
- **A vendor that will grow with your organization and budget**

Larger organizations should look for:

- **Advanced technical capabilities and “first movers”**
- **Mobile solutions and capabilities, especially for on-site engagements**
- **Dedicated agency rep or specific client rep**
- **First access for new features or products, before they are released publicly**

Section 2: Which Social Intelligence Tools to Consider

With hundreds of social intelligence offerings in the marketplace today, selecting a single tool or a set of tools can be challenging.

While there are a clear set of vendors that have been widely adopted by organizations, companies focused on advanced analytics and data integration, holistic marketing and management solutions, and those who have preferred social partner platform status are leading the pack.

To help guide organizations large and small, the 4A's Social Media Committee has surveyed its members across three core considerations:

1. Which social intelligence tools lead the pack overall by agency size?
2. Which social intelligence tools lead the pack by capability?
3. Which social intelligence tools lead the pack by value versus cost?

1. The following social intelligence tools lead the pack by **agency size**:

SMALL AGENCY AGENCY					LARGE
<hr/>					
0-50	50-100	100-500	500-1,000	1,000+	
Sysomos Radian6 Brandwatch Sprinklr Sprout Social Falcon Social	Sysomos Brandwatch Sprinklr Sprout Social Falcon Social	Sysomos Radian6 Brandwatch Sprinklr Crimson Hexagon	Sysomos Radian6 Brandwatch Sprinklr Spredfast NetBase Union Metrics GroupHigh quintly	Sysomos Radian6 Brandwatch Sprinklr Percolate Crimson Hexagon Spredfast NetBase Visible Technologies Tracx Synthesio Domo	

“Our agency is shifting from client-specific tools to agency-level tools available to all clients. As we vetted options, NetBase and Sysomos MAP seemed to provide the strongest product offerings within our budget parameters. The factors that differentiated Sysomos and NetBase from other tools included their ability to accurately assign sentiment to conversations using NLP and the opportunity to export data through API to our proprietary client dashboards built in Tableau. Sysomos' API access comes at an additional charge above and beyond the core software, so be sure to check pricing for data access when vetting tools.”

— Evan Carpenter
 Director of Community, Periscope

2. The following social intelligence tools lead the pack by **capability** (from a scale of 1 to 5, with 5 being the most advanced):

LIMITED CAPABILITY
CAPABILITY

ADVANCED



Sprout Social
Average: 2.5

quintly
Average: 3

Sysomos
Average: 3.5

Union Metrics
Average: 4.3

Sprinklr
Average: 2.9

Falcon Social
Average: 3

NetBase
Average: 3.5

Radian6
Average: 3.2

GroupHigh
Average: 3.6

Spredfast
Average: 3.2

Crimson Hexagon
Average: 3.6

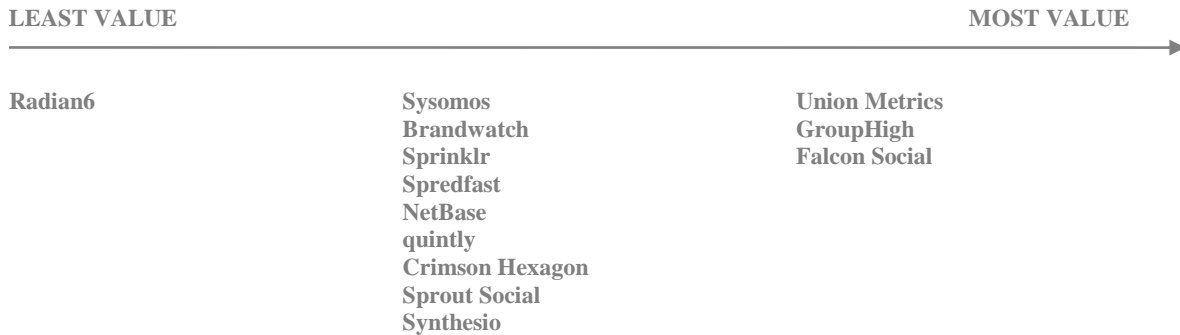
Synthesio
Average: 3.2

Brandwatch
Average: 3.7

“When it comes to value, U/X, ease of use, implementation, and the ability to use Sysomos as a listening tool and a tool for influencer identification, every agency I’ve worked with, and for, has used this tool. Crimson Hexagon is also popular among larger agencies because it offers sentiment training, but for global teams, it’s not as ideal given its difficult U/X.”

— *Layla Revis*
Senior Vice President, Global Digital Strategy Director, Leo Burnett

3. The following social intelligence tools lead the pack in **value versus cost** (from low value, to medium value, to high value):



"We use NetBase on the day-to-day deeper listening pulls and insights generation for client work, campaign measurement and new business. We use Spredfast Intelligence for real-time trending content and quick insight generation and to feed creative ideation. We have invested time in building strong partnerships with our listening suppliers; this is so that we can get the most out of the technology and are able to create custom builds for clients and internal teams. This also means we benefit from ongoing training and understanding of platform updates, and don't have one single point of failure on our own team."

— Gemma Craven
SVP, Director of Social & Mobile, McCann NY

Section 3: Auditing for New Social Intelligence Tools

Given the pace of innovation among social intelligence tools today, it's important to conduct periodic audits and reviews of existing and new vendors - at least twice a year. As a helpful guide, keep the following tips in mind when going through any auditing or evaluation process:

- **Work with your leadership team and key stakeholders to first understand what your goal for social intelligence is, and its possible applications. What to ask:**
Is your goal to inform a marketing campaign?
Is your goal to monitor conversation for better customer service and response?
Is your goal to determine the value of social for your business?
- **When evaluating tools, create a scoring system unique to your needs. What to ask:**
What is the available budget?
What capabilities am I looking for?
What services do I value from the vendor?
- **Assign a key stakeholder within your organization to research, demo and negotiate cost before committing. What to ask:**
Who should I include in the evaluation or auditing process?
Who is the final decision maker?
What amount of time will the owner need each month to properly "own" vendor selection?
- **Be sure your teams are trained and the tool is well integrated within your organization. What to ask:**
How often is training required?
Who needs to be trained, and at what degree of immersion?
Which groups or key stakeholders have adopted and are actively using the tool(s)?

Section 4: Predictions and Trends

Given the ever-changing nature of marketers' needs, and the rapid evolution of social intelligence tools and technologies, here are **five trends** to watch for in 2016:

- 1. Social Marketing Platforms Converge With Content Marketing Platforms**
This is a trend we are already seeing from tools like Percolate, Sysomos Expion and Sprinklr. Look for big moves from all three, and expect others to join -- especially as more vendors are able to integrate deeper into marketers' existing platforms and offer global solutions.
- 2. Image Recognition Will Finally Arrive**
Social intelligence tools are becoming ever more powerful when it comes to their ability to search for content. Expect to see intelligence tools with image recognition coming soon, which will be a killer feature in a social world that is increasingly visually fueled. Add to that the ability to look at search intent data, and you can look at what people are talking about, the images they are sharing and what they are searching for. A much more robust view into human behavior.
- 3. Consolidation and Strategic Acquisitions**
Over the past few years, we've seen companies like Sysomos acquire Expion and Spredfast merge with Mass Relevance. Expect to see more of this in 2016 as vendors round out their capabilities and the overall landgrab heats up.
- 4. Access Will Drive Innovation (and Adoption)**
With social channels like Snapchat seeing exponential growth, more marketers (looking to spend more ad dollars) will want and expect access to consumer data. Technology companies who can gain access to private APIs and who can build quickly on top of public APIs will continue to reign supreme.
- 5. Tools Will Become More Costly**
As these tools become more valuable, companies will begin to invest more in their use. As a result, prices will rise and pricing models will change. In fact, many tools are switching to seat-based pricing models like NetBase and Sysomos MAP, specifically.

[4A's Social Media Committee](#)

For more on social intelligence tools, or for help on vendor selection, reach out to the 4A's Social Media Committee by e-mail at socialmedia@aaaa.org.

