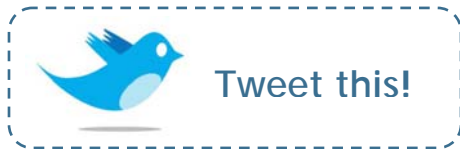




Twitter & the Consumer-Marketer Dynamic

A look at how consumers and brands are using Twitter – and how marketers can apply consumer use patterns to improve their own presences on the platform.



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Introduction

It's hard to imagine a world without Twitter – the microblogging platform that has transcended global culture to change the way people share information and connect with others online.

But long before it became a breakout among digital media types at SXSW in 2007, before Ashton Kutcher raced CNN to a million followers and before “fail whale” entered the mainstream lexicon, Twitter was a somewhat nebulous concept born out of a brainstorm among founders Jack Dorsey, Evan Williams and Biz Stone. Their idea was simple: to create a social network built around SMS-length conversations. [Dorsey would later say](#) they chose to call the service “twitter” because its definition so aptly described the core of their product: “a short burst of inconsequential information.”

Four years after its founding, Twitter has more than 100 million users¹ that log a collective 65 million tweets each day. Beyond that, the site records 190 million site visitors per month² – indicating that a large volume of people are reading content on Twitter, even if they aren't participating in the conversations themselves.

The surge of consumer interest has inspired brands to follow suit, and today, businesses great and small are signing on in force. This whitepaper analyzes the current state of Twitter when it comes to consumer-marketer dynamics. Why are people using Twitter – and how? And given these insights, how can marketers use the service to create deeper connections with consumers?

¹ Evan Williams as quoted by Reuters (<http://www.reuters.com/article/idUSTRE63D46P20100415>)

² Twitter COO Dick Costolo, as quoted by TechCrunch (<http://techcrunch.com/2010/06/08/twitter-190-million-users/>)

Executive Summary

KEY FINDINGS

Twitter is primarily for people, not corporations. Those of us in the marketing industry tend to see Twitter as a marketing or professional networking tool, but it's important to remember that it is a consumer-dominated medium.

- More than **90%** of tweets come from consumers
- Only **12%** of consumer tweets mention a brand
 - When someone mentions a brand name on Twitter, they're most likely talking about a Social Network (**22%** of mentions), or an Entertainment (**17%**) or Technology brand (**17%**)
 - The top brands mentioned on Twitter are Twitter itself, Apple products/brands and Google

Twitter makes the private space public. While marketers have a voice in the mix, Twitter remains an important tool for listening to what consumers are saying in a mostly un-filtered, un-moderated environment. There are ripe opportunities for brands to get to know their customers via online listening.

- **94%** of tweets are personal (vs. professional/self-promotional)
- **92%** of users keep their tweets public
- **85%** of tweets reflect original content (non-RTs)

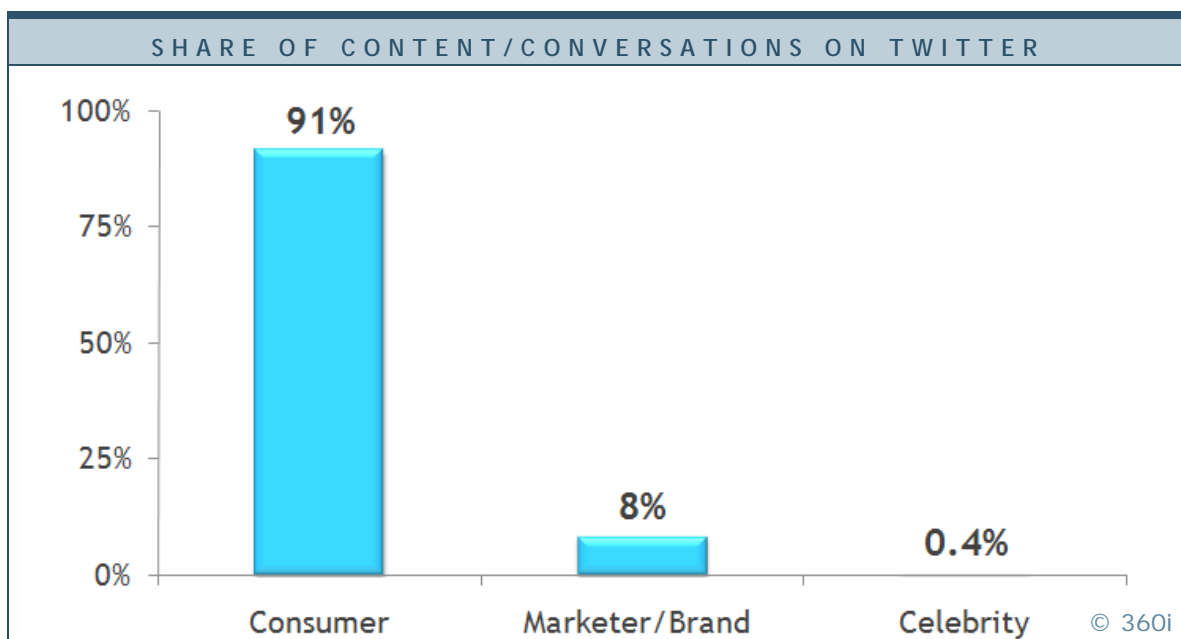
Companies tend to talk at people - not with them. The opportunity for marketers to become part of the conversation remains vast. For example, many brands use the channel to pass along information, but fail to capitalize on opportunities to truly connect with consumers via two-way conversations.

- **43%** of consumer tweets are conversational (@replies to other users)
- Yet only **12%** of all marketer tweets demonstrate active dialogue with consumers, signifying that most of them aren't tapping Twitter's full potential
- Only **1%** of consumer tweets that mention a brand are part of a conversation with that brand

Part I: Twitter & the Power of the Consumer Voice

WHO IS TWEETING?

Twitter is a platform dominated by the voice of the consumer. In fact, more than 90% of tweets originate from consumers – and only 8% are authored by marketers. Though a fair number of brands have used Twitter to drive sales (like [Dell](#)), improve customer service (like [Comcast](#)) and enhance brand loyalty (like [Starbucks](#)), it's important for marketers to keep in mind that it's not all about them. In fact, it's mostly not.



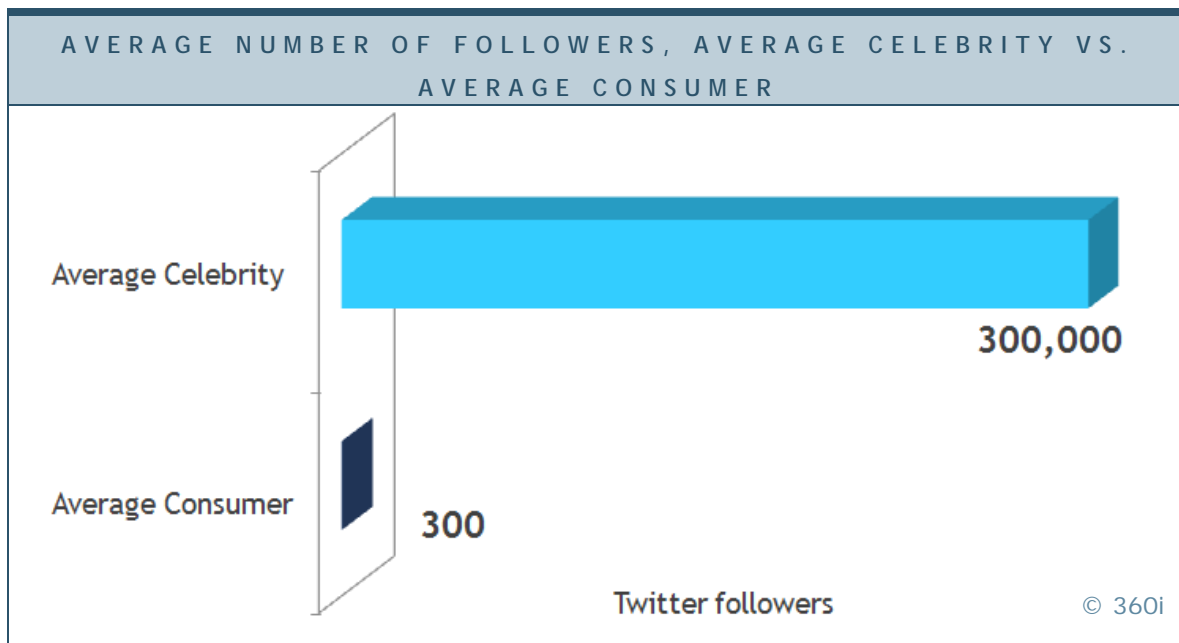
Although celebrities make up a very small portion of the population on Twitter, their reach is far greater than that of the average consumer, making them a small but very influential audience. While the average consumer has 300 followers³, a top 500 celebrity has 300,000 followers or more⁴.

This means that by activating just one celebrity on Twitter, a marketer can reach 1000x more eyeballs than he or she can with the average consumer. Looked at differently, by activating one celebrity, a marketer could gain the

³ "State of the Twittersphere," Hubspot 2010

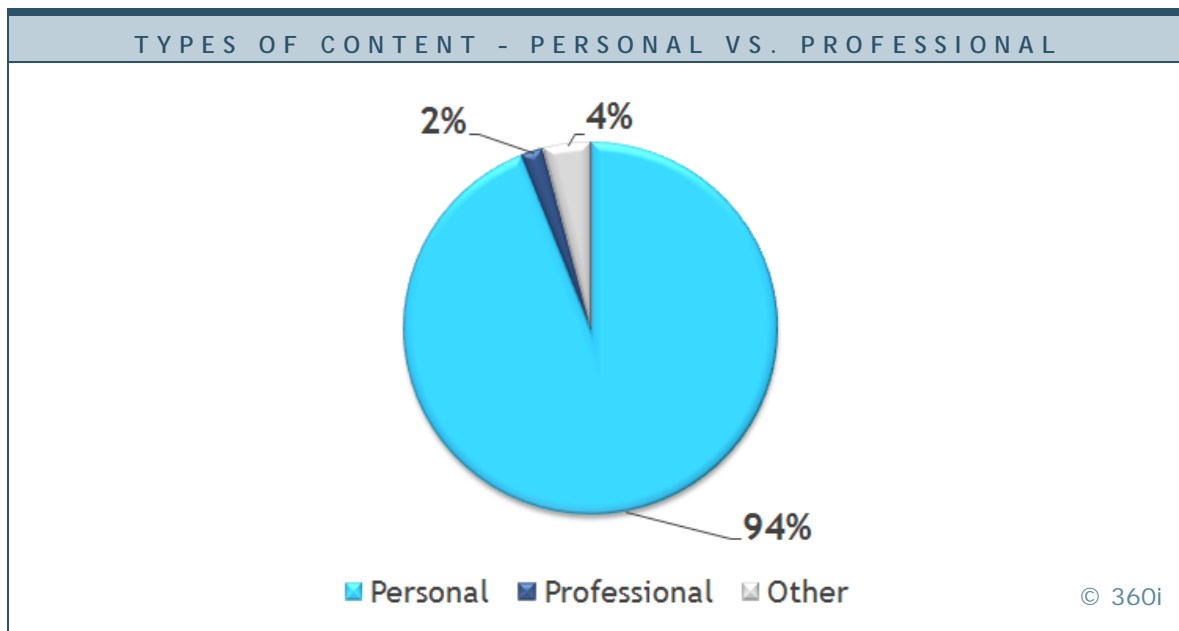
⁴ Twitaholic.com

same reach as they would by encouraging 1,000 consumers to tweet about their brand.



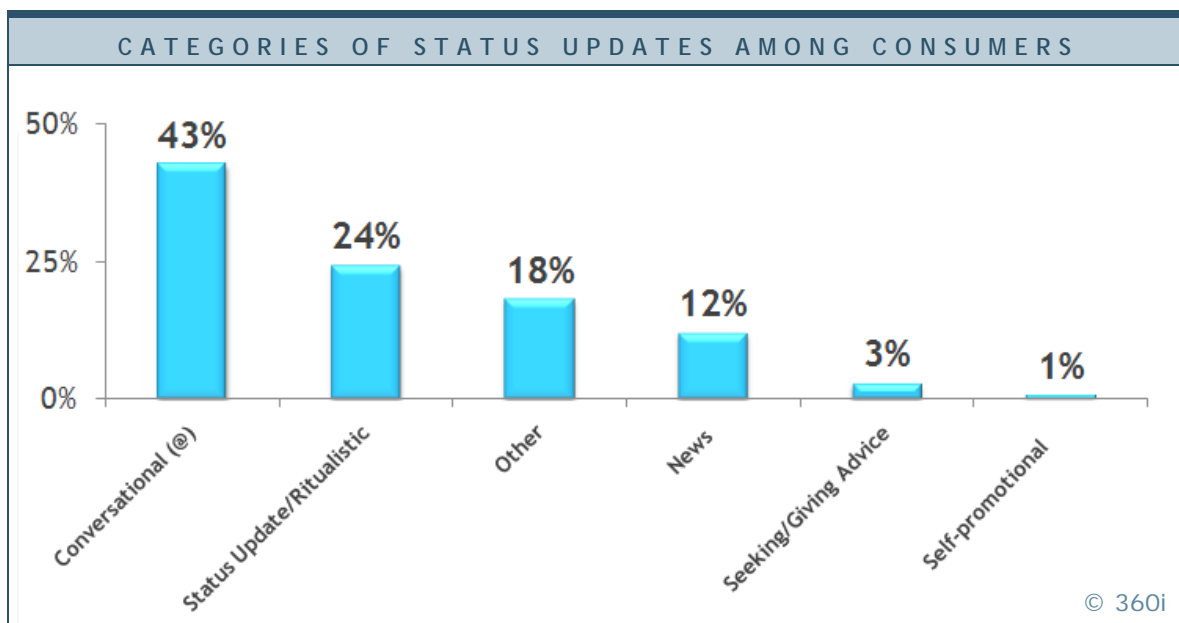
WHAT DO CONSUMERS TWEET ABOUT?

People use the microblogging platform to lifecast their daily activities – often relaying their ephemeral thoughts as a stream of consciousness while at home, at work or on the go via mobile devices. An overwhelming 94% of tweets analyzed were personal in nature (e.g. what someone did, what they are doing, a conversation with a friend) while only 2% were professional/self-promotional (e.g. sharing industry news, providing updates about one’s career from a personal account or promoting a business), despite some claims to the contrary. Wired magazine’s Evan Ratliff, for example, [recently wrote](#) that “self-aggrandizement” is “standard fare” on Twitter.



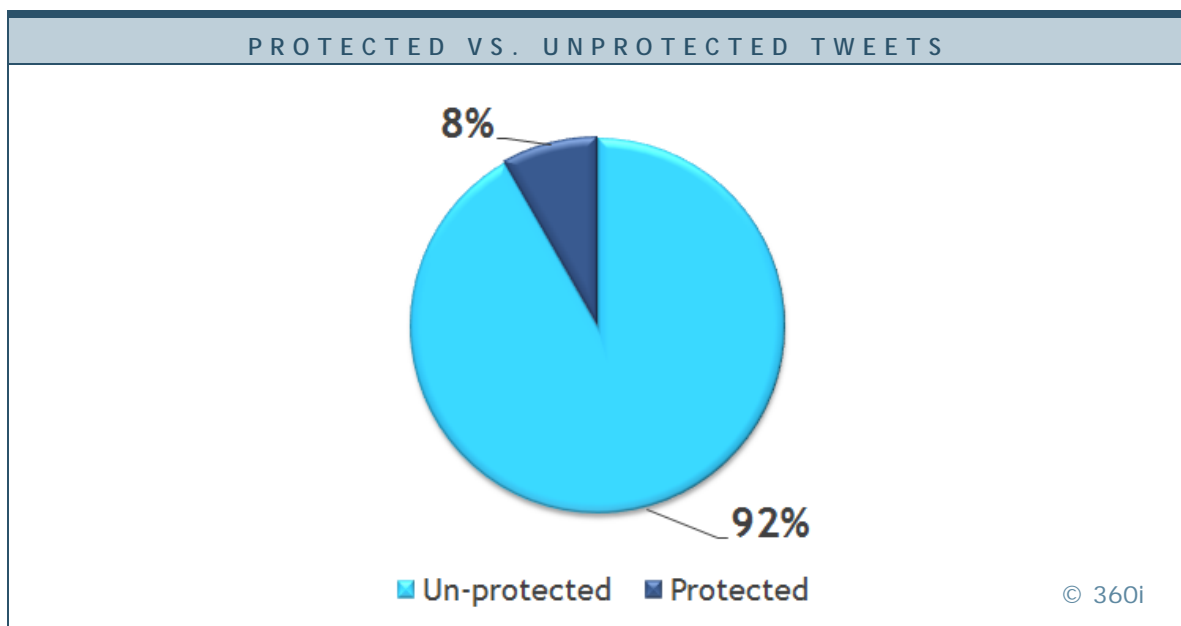
TWITTER IS A CONVERSATION, NOT A MEGAPHONE.

Consumers use Twitter to share information with others, to find new information among their network and to connect with people of similar interests. More than 40% of all tweets start with @, which means they are directed at someone. In other words, the number one reason for a consumer to compose an original tweet is to converse with another user. By contrast, personal status updates with no intended recipient comprise only 24% of original tweets.



TWITTER IS OPEN.

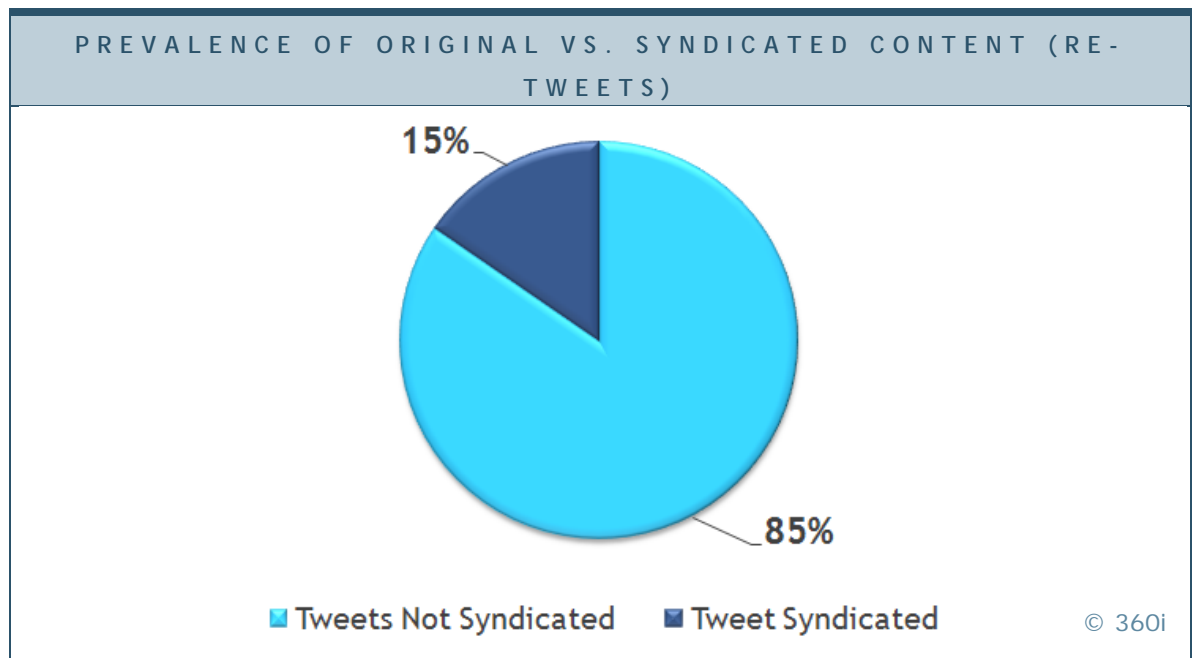
Consumers overwhelmingly embrace the inherent openness of the platform. A full 92% of users keep their tweets public, as opposed to “protecting” their tweets, which hides updates from users not approved by the author and from [Twitter search results](#). Unlike Facebook, where privacy controls make it difficult for marketers to monitor conversations among consumers, only 8% of Twitter users make their tweets private, creating a ripe platform for online listening.



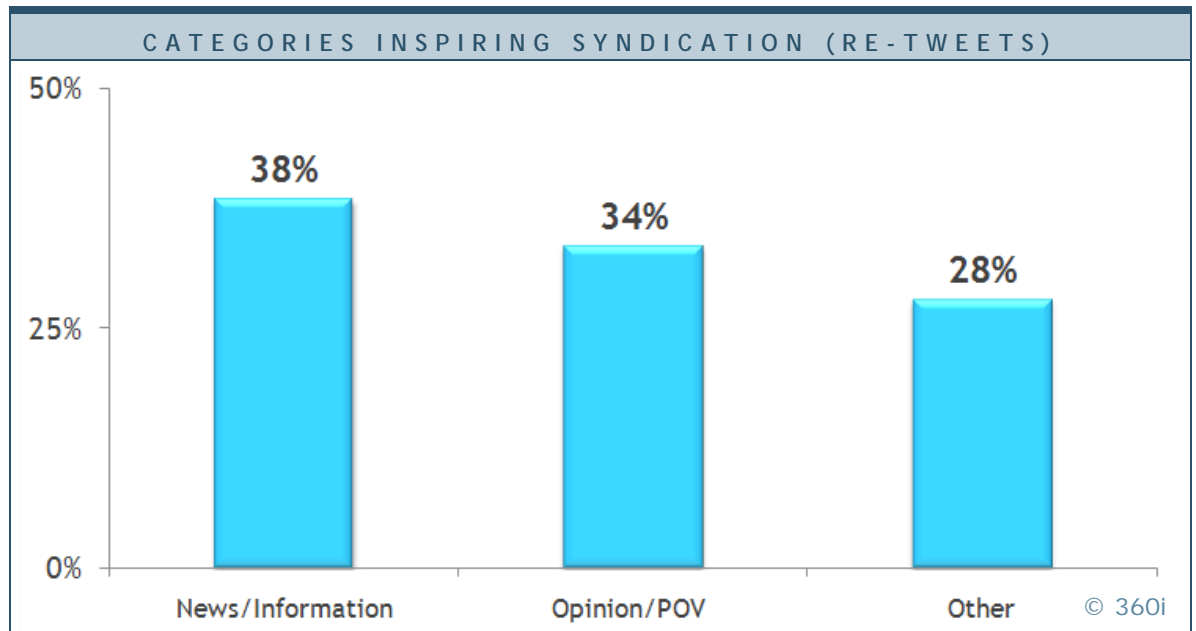
Twitter users are more comfortable sharing certain pieces of personal information than others. People often post a picture of themselves (70%) and give their location (66%). Most don't share specifics on their age (3%) or job/career (20%). The unique nature of the data available can make it very difficult to filter conversations by age range or job type, but relatively easy to separate and analyze conversations by geographic locale to uncover regional trends.

Part II: The Anatomy of a Tweet

Tweets are original: 85% represent original content rather than re-tweets (re-broadcasted tweets from other users) and 28% of all tweets contain a link. Consumers are much more likely to pass along a link with their own commentary than to simply share it via a re-tweet. This underscores that Twitter, for the most part, is a tool consumers use to express themselves – rather than a means to simply pass on information that they have heard somewhere else.



Of those syndicated tweets (RTs), 38% reflect news and information while 34% relay an opinion or point-of-view unique to the original author. The remaining 28% include re-tweets that syndicate an update but tack on additional commentary (i.e. "RT @MSTdjosht: Can't sleep. // yeah, me neither").



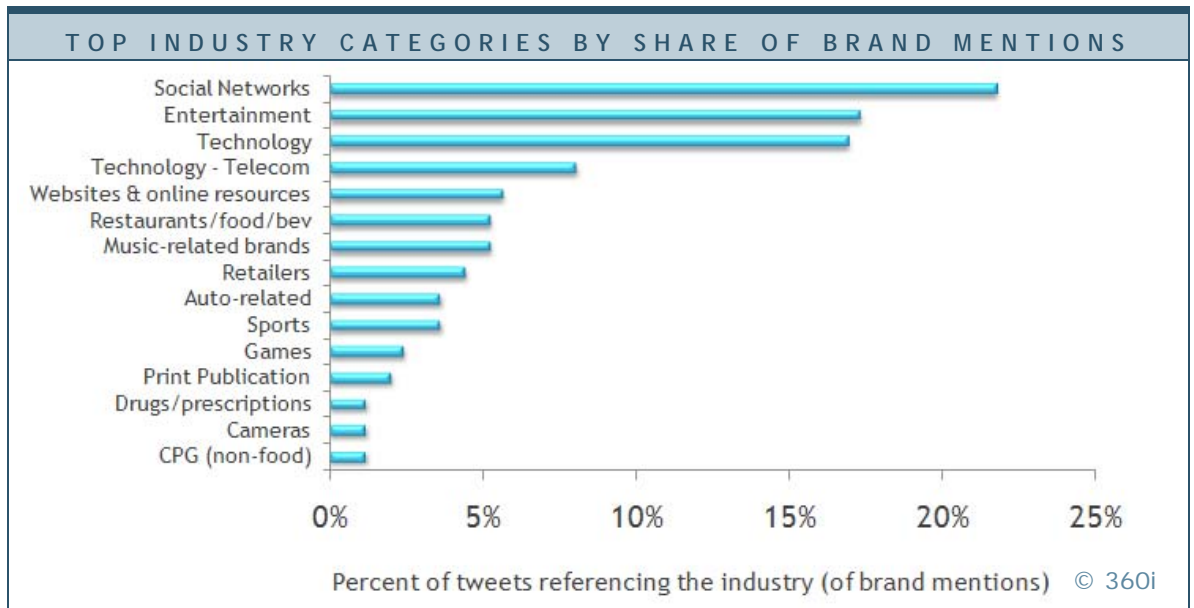
Part III: Consumers vs. Marketers

Analysis of the content of tweets coming from consumers vs. marketers indicates that consumers and brands use the medium in vastly different ways. Just as 90% of tweets are NOT authored by brands, nearly 90% of tweets are not about brands, either. In fact, brands are quite tangential when it comes to conversations on Twitter: only 12% of tweets mention a brand by name. This estimation is somewhat lower than that of Penn State's College of Information Science & Technology [2009 study](#), which found that 20% of tweets mentioned a brand.

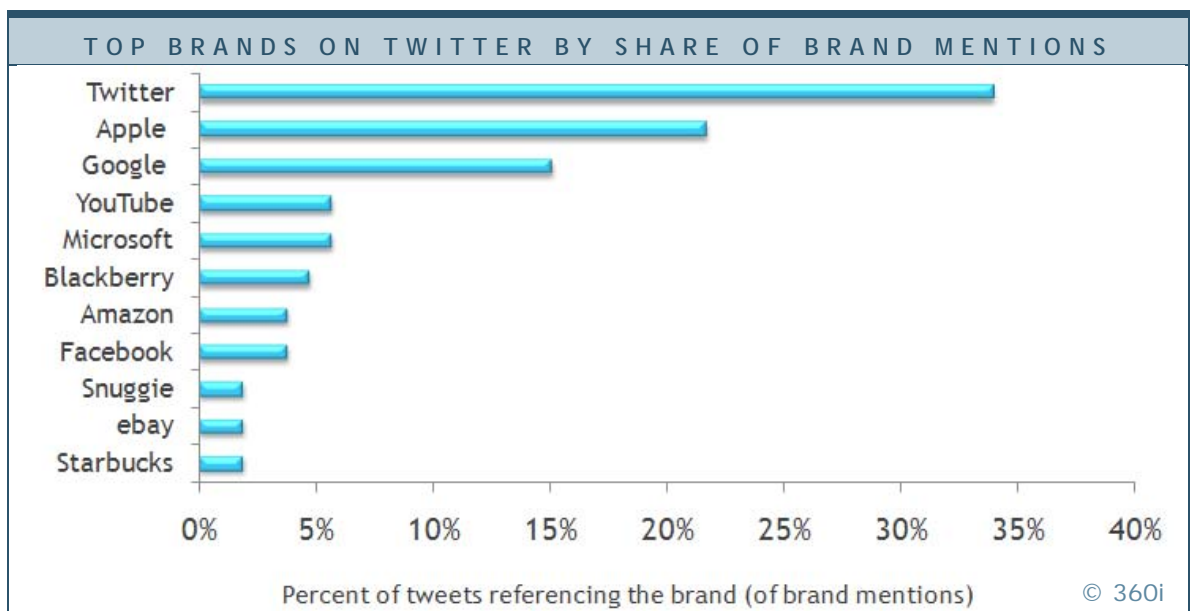
Increased consumer adoption of Twitter after the time of that study may explain at least part of this discrepancy, but what is clear is that Twitter remains an uncluttered channel for brands to leverage. What's more, the tweets about brands – however minimal they may be – hold important insights for marketers interested in learning more about the psyche of their consumers as it relates to their brands.

WHICH BRANDS ARE MENTIONED MOST OFTEN?

Among brand mentions, most tweets discussed Social Networks (22%), Entertainment (17%) and Technology (17%) brands.



The top brands mentioned were Twitter itself, Apple brands and products and Google.



TWITTER BENEFITS BRANDS THAT ARE PART OF THE CULTURAL FABRIC.

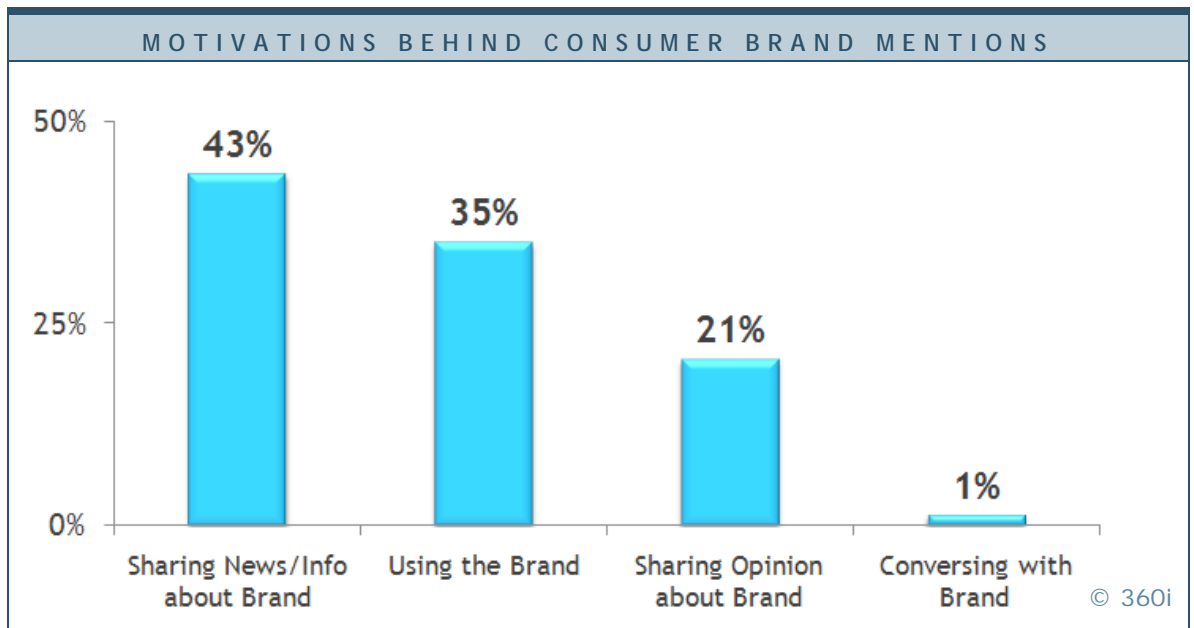
While not in any of the leading verticals, Snuggie was one of the most mentioned brands in the study, appearing in 2% of all conversations – even given its small corporate following on the network. (As of this report’s publish date, [@OriginalSnuggie](#) had just under 600 followers.) In this case, the high volume of mentions seems to be more indicative of its permeation of the

cultural fabric and less about a concerted social marketing push from the brand.

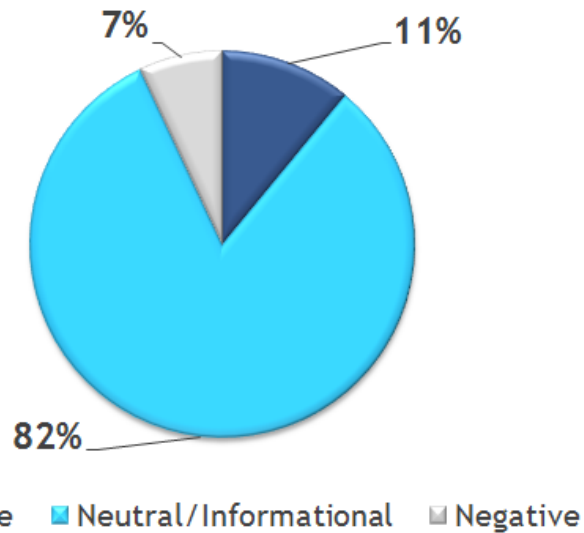
On the other hand, mentions of brands like Disney and Starbucks – both cultural fixtures on much larger scale – are likely bolstered by top-down social strategies that enhance consumer relations within the network. For example, Starbucks ([@Starbucks](#)) is one of the most engaging brands on Twitter (with just under one million followers at the time of this study) and Disney has recently made waves for being the first brand partner for Twitter’s [trending topics](#) and [@Earlybird](#) ad programs.

BREAKING DOWN BRAND MENTIONS

When it comes to talking about brands on Twitter, consumers are largely sharing news or information about the brand (43%) or reporting use of or interaction with the brand (35%). About one fifth of tweets mentioning brands demonstrate an outward opinion of the brand – though only 7% of mentions demonstrate negative sentiment toward the brand. Most mentions fall into the neutral/informational category (82%) and 11% reflect positive sentiment.



CONSUMER SENTIMENT WHEN MENTIONING A BRAND

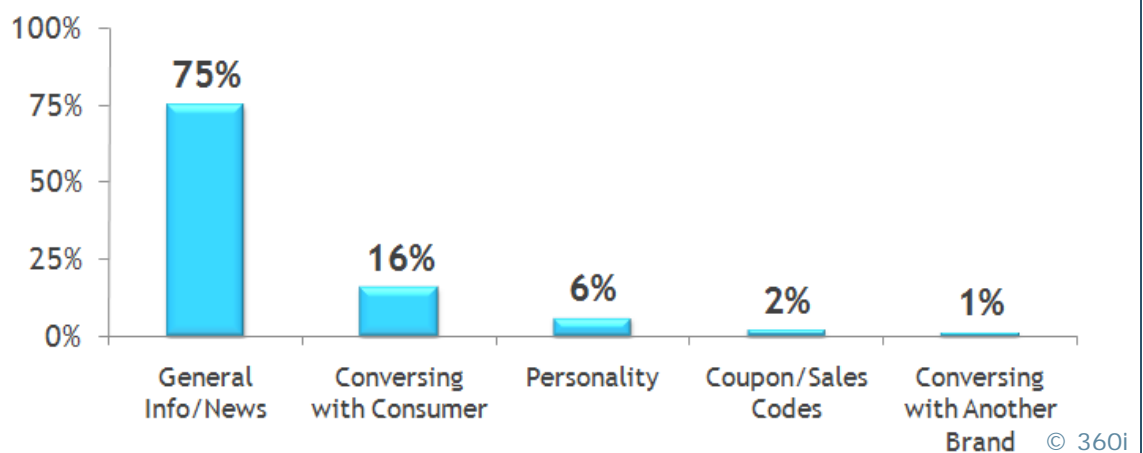


With this in mind, the consumer research opportunity with Twitter centers more on an ethnographic focus – as a window into how people are living their lives – and less on whether people like or dislike brands.

MARKETERS CAN DO MORE

While consumers use Twitter as a conversational medium, most marketers aren't using it that way and there remains a ripe and largely untapped opportunity for two-way conversations between brands and consumers. Currently, a mere 1% of brand mentions by consumers on Twitter represent dialogue between brands and consumers.

CATEGORIES OF STATUS UPDATES AMONG BRANDS/MARKETERS



Three out of four tweets by marketers contain messaging centered on news and information – and only 16% of marketer tweets demonstrate active dialogue with consumers.

Marketers could benefit from looking for ways to engage consumers more fully on Twitter through a more conversational tone (e.g. asking questions and inviting response rather than simply passing along information). Encouraging and participating in a dialogue with consumers will encourage more re-tweets, as well as help promote deeper brand relationships.

Conclusion

While it's hard to predict how far Twitter's star-power can and will take it, increasingly high mobile adoption rates will likely drive continued growth among consumers. Over the past several months Twitter has made strides to incorporate marketers more directly into their model via sponsored "trending topics" and the @Earlybird program, which allows partner brands to broadcast special limited-time deals through the service.

Marketers can expect to see even more paid media programs as the company builds out its ad model – but as this whitepaper shows, there remains a largely untapped opportunity for brands to create deeper connections with consumers via earned media and to learn more about what motivates them with online listening through Twitter.

Though many people perceive Twitter as a place for random status updates, re-tweets and marketing messages, this study shows how Twitter is largely a reflection of everyday conversation. Twitter is a platform dominated by the voice of the consumer and consists primarily of two-way conversations – the real value for marketers who participate on Twitter is in creating an ongoing dialogue with consumers that enables brands to become a more meaningful part of people's everyday lives.

Methodology

For this report 360i analyzed more than 1,800 tweets published between October 1, 2009 and March 31, 2010. Spam was removed from the sample and not counted in the final analysis. The statistics in this study have a confidence level of 99% and a confidence interval of +/- 3.

ABOUT 360i

360i is an award-winning digital marketing agency that drives results for Fortune 500 marketers through insights, ideas and technologies. 360i helps its clients think differently about their online presence and evolve their strategies to take advantage of the new world of marketing communications – one where brands and consumers engage in interactive and multi-directional conversations. Current clients include Kraft Foods, JCPenney, Coca-Cola, NBC Universal and H&R Block.

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