More and more companies are looking at all of their media activity in a more holistic fashion (POEM).

**Example Tactics**

**PAID**
- *Purchased* marketing activities. Generally short term in nature and end in the absence of funding.
- Traditional TV and Print advertising as well as digital efforts such as Paid Search, Display, Video, Gaming, etc.

**OWNED**
- Efforts which occur on proprietary properties which are *wholly owned* by the Marketer.
- Brand and Mfg. Web Sites, Brand tools (i.e. Tide Stain Brain), and CRM efforts.

**EARNED**
- Messaging carried out *voluntarily* by consumers on behalf of the brand.
- Consumer ratings and reviews. Online conversations on discussion boards and blogs. Organic search and traditional (offline) WOM.
Mission: Help our clients win in social media by weaving social intelligence into the fabric of their businesses.
Global Footprint

NM Incite covers 31 markets across 15 languages
Social media is the fastest growing media in history – today over 3 in 5 internet users engage in social media...

**Social Media Use\(^1\)**

<table>
<thead>
<tr>
<th>% All Internet Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008: 29</td>
</tr>
<tr>
<td>2010: 61</td>
</tr>
</tbody>
</table>

**Facebook Growth**

Monthly Minutes Spent on Site Worldwide (Millions)

Users average 55 minutes on Facebook every day

---

*Note: 1) Based on response to the question: Ever used online social or professional networking sites like Friendster or LinkedIn? (n=1,756)*

*Source: Pew Internet & American Life Project; NetView & @Plan Data; Nielsen Q1 2010 Consumer Confidence Survey; NM Incite, 2010 State of Social Media*
...largely driven by real world connections and the desire to view and contribute to reviews of products and services

% Social Media Users Ever Doing Activity

Family / Friends
- Family Contact: 89%
- Find/Maintain Old Friends: 88%
- Find New Friends: 70%

Lifestyle / Entertainment
- Entertainment: 67%
- Creative Outlet: 64%
- Gaming: 47%
- "How To" Info: 45%
- Follow Celebrities: 35%
- Dating: 16%

Products / Services
- Read Consumer Feedback: 66%
- Learn about Products: 60%
- Get Coupons, Promos: 58%
- Give Positive Feedback: 54%
- Give Negative Feedback: 51%

26% of online discussion mentions a product, service or brand

This matters to consumer brands because exposure to buzz drives purchase intent.

Impact of Exposure To Buzz on Purchase Intent

- Large increase in intent
- Difference in intent between exposed and control
- No increase in intent

Word-of-mouth is the primary factor behind 20-50% of all purchasing decisions.

SOURCE: NM Incite proprietary research; McKinsey
The reach of social media magnifies its impact

Case example: Buzz volume on top US TV brands, Q2 2010

To 10 million unique viewers

From 20,000 buzz mentions...

= 20,000 people

x500 exposure

SOURCE: NM Incite
Businesses are learning about the perils and promise of social media...
...and recognizing that there is a great opportunity to take social across the enterprise
Social media provides unique insights...

Survey attributes tested in survey questions:
- Environmentally friendly: 68%
- Cost effective: 40%
- Healthier: 25%
- More comfortable: 18%
- Fit well: 13%

Social media analysis attributes mentioned by consumers online:
- Organic: 42%
- Diaper rash: 28%
- Home schooling: 24%
- Home birthing: 16%
- Flushable: 10%
- Cheaper: 8%
- Cost: 4%
- Environmentally friendly: 2%

Survey indicates 68% of consumers believe "environmentally friendly" is most important, however, unprompted consumer feedback ranks it last.

In authentic, online conversations, consumers indicate that "organic" and avoiding "diaper rash" are most important product attributes.
...and can drive loyalty, advocacy and sales

### Facebook Reaction

**Additional Annual Spend of Facebook Fans vs. Non Fans (US$)**

2010 – US Only

<table>
<thead>
<tr>
<th>Brand</th>
<th>Current # of Facebook Fans (millions)</th>
<th>Additional Annual Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonalds</td>
<td>9.6</td>
<td>$160</td>
</tr>
<tr>
<td>Nokia</td>
<td>3.9</td>
<td>$107</td>
</tr>
<tr>
<td>Victoria’s Secret</td>
<td>14.7</td>
<td>$76</td>
</tr>
<tr>
<td>Coca-Cola</td>
<td>32.8</td>
<td>$70</td>
</tr>
<tr>
<td>X-Box</td>
<td>10.8</td>
<td>$34</td>
</tr>
</tbody>
</table>

Facebook fans are 28% more likely than non-fans to **continue using the brand** and 41% more likely to **recommend that product** to their friends.

Note: 1) Self-reported annual spend (n=4,000)

SOURCES: NM Incite; Syncapse; Facebook

Copyright 2011 NM Incite. Confidential and proprietary.
Executives are asking ...

1. Big opportunity: Is there a 50-100M opportunity for us in Social?

2. Rational, holistic view: We have a million things going on in Social. How does it all fit? Are we doing the right things? Are we doing things the right way?

3. Fit with paid media: How does ROI on Social compare with traditional/paid media? Does Social actually drive sales? What are the metrics we should care about at the senior level?

4. “Listen” vs. “engage”: Where should we engage and where should we just listen? Who should be allowed to engage? How do we empower them? How do we prevent a free-for-all?

5. Avoid costly mistakes: We hear some companies shifted large budget from traditional to social and lost market share. How do we avoid that?
Gain competitive advantage through social media intelligence

Monitoring
Listen and engage

Research
Better understand customers

Metrics
Measure the impact of social initiatives and improve returns from social investments

Advice
Identify high-impact social opportunities and develop plans to execute against them
Know where you are talked about...
Shampoo Category: Beauty and Parenting sites lead with the most Shampoo Brand and Total hair buzz

Key Finding: Opportunity is seen for Shampoo Brand to expand its efforts to penetrate Parenting Sites where total hair category is discussed.

Sites Breakout – SHAMPOO BRAND A

- Fashion/Beauty: 49%
- Parenting: 3%
- General Interest: 3%
- Sports: 3%
- Entertainment: 5%
- Diet/Health: 6%
- Weddings: 6%
- Shopping/Bargains: 11%
- Gaming: 4%
- Food/Dining: 4%

N = 160 messages for all sites where Shampoo Brand A discussion occurs.

Site Breakout – Hair Category

- Parenting: 37%
- Beauty/Fashion: 6%
- General Interest: 6%
- Teen: 4%
- Weddings: 4%
- Gaming: 2%
- Diet/Health: 11%
- Sports: 29%

N = 22,328 messages for top 20 sites where hair care discussion occurs.
Twitter buzz is dominated by business news as usual, with all peaks being driven by various takeover news. This includes the (INSURANCE BRAND) takeover. Resolution report profits after their takeover of part of (INSURANCE BRAND), and (INSURANCE BRAND) are reported to be interested in taking over XXXX. In amongst this business news, there are also a few negative service comments found on Twitter in the latter half of the month due to unhelpfulness of employees. There are also both positive and negative opinions about the new AXA car insurance TV advert.

“abc123nicola: That axa insurance ad send out a really good message *gosh!
Sound like mum*
http://myloc.me/aJxP”
Twitter.com, 17th August 2010

“davidjollycfp: Why would Axa allow people with single figure IQs to design their admin processes and then let them run it?”
Twitter.com, 17th August 2010
How large is the opportunity?

41% or 15M Filipinos use the Internet in the last 12 months*

82% Regularly use Social Networking Sites**

* Source: Nielsen Media Index Q2 2011 ** Yahoo!-Nielsen Net Index 2011
Case Study: Typhoon Pedring

- In September 27, 2009, Typhoon Ondoy hit Luzon and left many casualties. Two years after, another strong storm Pedring came causing damages they say more worst than Ondoy. In the digital age, many online Filipinos resorted to Twits, Facebook and blogs for information, communication and more opportunity for socialization.
- Let’s find out the volume of messages the typhoon created. Who are sharing? What are the messages they talk about? Where are they having the discussion?
- With Nielsen’s NM Incite, the latest online social media monitoring tool, communications and tracking of consumer engagements are possible.

Parameters:
- Keywords: Typhoon Pedring, Pedring
- Period: Last 30 days (September 5 – October 5, 2011)
- Social Media: Blogs, Forums, Groups, Twitter, Facebook
### Volume Trends: Typhoon Pedring

News networks capitalized on Twitter to send out updates, others are sharing links and photos...

<table>
<thead>
<tr>
<th>Blogs, Groups, Forums</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total # of Messages</td>
</tr>
<tr>
<td>244</td>
</tr>
<tr>
<td>(mostly to inform and ask for help to the victims of typhoon)</td>
</tr>
<tr>
<td>8,038</td>
</tr>
<tr>
<td>(thousands of twits from news networks and sharing of links and photos)</td>
</tr>
<tr>
<td>798</td>
</tr>
<tr>
<td>(stories on flooded areas, casualties, sending sentiments and reminders to keep safe)</td>
</tr>
</tbody>
</table>

**Facebook**

- “Red cross seeks your help for the victims of 'Pedring' Red cross seeks your help for the victims”
  - [https://www.facebook.com/i.am.filipino](https://www.facebook.com/i.am.filipino)
  - Author: Definitely Filipino

**Twitter**

- “Typhoon Pedring batters the Philippines Photos | Typhoon Pedring batters the Philippines Pictures”
  - [http://twitter.com/#!/cookissencream](http://twitter.com/#!/cookissencream)
  - Author: cookissencream

- “When In Manila, please do be safe and avoid flood areas as Typhoon Pedring”
  - [http://www.wheninmanila.co](http://www.wheninmanila.co)
  - Author: Vince Golangco
September 27, at the height of typhoon Pedring, many buzzed about flooded areas, stranded passengers, cancellation of events, a number of casualties in different places, and expressions of sentiments for those heavily affected areas.

Facebook flood with information on storm as well as calling out for donations to the victims of typhoon

Twit heightened for series of updates on Pedring and sharing of typhoon photos
Twitter generated more buzz but Facebook and other CGM’s follow the same pattern. Spike in September 27 was the landfall of “Pedring”
### Top Blogs, Boards, Forums

**Typhoon Pedring as of September 5 to October 5, 2011**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Source</th>
<th>Messages</th>
<th>Share %</th>
<th>Authors</th>
<th>CGM Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><a href="http://www.digitalphotographer.com.ph/forum">www.digitalphotographer.com.ph/forum</a></td>
<td>48</td>
<td>21.43</td>
<td>23</td>
<td>Boards</td>
</tr>
<tr>
<td>2</td>
<td><a href="http://www.coolbuster.net">www.coolbuster.net</a></td>
<td>31</td>
<td>13.84</td>
<td>6</td>
<td>Blogs</td>
</tr>
<tr>
<td>3</td>
<td><a href="http://www.christianforums.com/">www.christianforums.com/</a></td>
<td>15</td>
<td>6.7</td>
<td>12</td>
<td>Boards</td>
</tr>
<tr>
<td>4</td>
<td>bagyo.ph</td>
<td>13</td>
<td>5.8</td>
<td>3</td>
<td>Blogs</td>
</tr>
<tr>
<td>5</td>
<td><a href="http://www.episodeseasonguide.info">www.episodeseasonguide.info</a></td>
<td>13</td>
<td>5.8</td>
<td>3</td>
<td>Blogs</td>
</tr>
<tr>
<td>6</td>
<td><a href="http://www.filamnation.com">www.filamnation.com</a></td>
<td>12</td>
<td>5.36</td>
<td>3</td>
<td>Blogs</td>
</tr>
<tr>
<td>7</td>
<td><a href="http://www.livingincebuforums.com/ipb/inde">www.livingincebuforums.com/ipb/inde</a></td>
<td>12</td>
<td>5.36</td>
<td>7</td>
<td>Boards</td>
</tr>
<tr>
<td>8</td>
<td>mellow1011.net</td>
<td>8</td>
<td>3.57</td>
<td>2</td>
<td>Blogs</td>
</tr>
<tr>
<td>9</td>
<td>keziahknows.info</td>
<td>8</td>
<td>3.57</td>
<td>2</td>
<td>Blogs</td>
</tr>
<tr>
<td>10</td>
<td><a href="http://www.snipcebu.com">www.snipcebu.com</a></td>
<td>8</td>
<td>3.57</td>
<td>2</td>
<td>Blogs</td>
</tr>
</tbody>
</table>
## Top Twitters

### Typhoon Pedring as of September 5 to October 5, 2011

<table>
<thead>
<tr>
<th>Rank</th>
<th>Twitter Author</th>
<th>Messages</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>phlnewsonline</td>
<td>204</td>
<td>32.18</td>
</tr>
<tr>
<td>2</td>
<td>ancalerts</td>
<td>84</td>
<td>13.25</td>
</tr>
<tr>
<td>3</td>
<td>akjournalismo</td>
<td>61</td>
<td>9.62</td>
</tr>
<tr>
<td>4</td>
<td>gmanews</td>
<td>59</td>
<td>9.31</td>
</tr>
<tr>
<td>5</td>
<td>manilatop10</td>
<td>47</td>
<td>7.41</td>
</tr>
<tr>
<td>6</td>
<td>news5aksyon</td>
<td>38</td>
<td>5.99</td>
</tr>
<tr>
<td>7</td>
<td>newsman_net</td>
<td>37</td>
<td>5.84</td>
</tr>
<tr>
<td>8</td>
<td>saksi_sona_ntg</td>
<td>37</td>
<td>5.84</td>
</tr>
<tr>
<td>9</td>
<td>blackpearl_inc</td>
<td>34</td>
<td>5.36</td>
</tr>
<tr>
<td>10</td>
<td>bayanmo</td>
<td>33</td>
<td>5.21</td>
</tr>
</tbody>
</table>
## Top Facebook Fan Page

### Typhoon Pedring as of September 5 to October 5, 2011

<table>
<thead>
<tr>
<th>Rank</th>
<th>Facebook Fan Page</th>
<th>Messages</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>abs-cbn</td>
<td>24</td>
<td>32.88</td>
</tr>
<tr>
<td>2</td>
<td>energizer philippines</td>
<td>16</td>
<td>21.92</td>
</tr>
<tr>
<td>3</td>
<td>ateneo de manila university</td>
<td>7</td>
<td>9.59</td>
</tr>
<tr>
<td>4</td>
<td>definitely filipino</td>
<td>6</td>
<td>8.22</td>
</tr>
<tr>
<td>5</td>
<td>polytechnic university of the philippines</td>
<td>4</td>
<td>5.48</td>
</tr>
<tr>
<td>6</td>
<td>100% katolikong pinoy!</td>
<td>4</td>
<td>5.48</td>
</tr>
<tr>
<td></td>
<td>smart communications, inc.</td>
<td>3</td>
<td>4.11</td>
</tr>
<tr>
<td>7</td>
<td>ting juan</td>
<td>3</td>
<td>4.11</td>
</tr>
<tr>
<td>8</td>
<td>michael allones</td>
<td>3</td>
<td>4.11</td>
</tr>
<tr>
<td>9</td>
<td>ford fiesta in the philippines</td>
<td>3</td>
<td>4.11%</td>
</tr>
</tbody>
</table>
Word Cloud for “19 Soldiers Ambushed in Mindanao”

The recent national issue created divided conversation topics in Social Media between Peace and War as well as President Aquino’s call to deal with rebels and justice for the victimized military soldiers.

CGM Types: Blogs, Forums, Groups, Facebook
Period: October 19-26, 2011
Parting Thoughts...

- What impact has social media had on your customers’ decision journey?
- Is your organization ready to embrace social? Do you have an open, “sense and respond” culture?
- Are you considering earned media when you are allocating marketing and media budgets?
- Are you thinking of social as a potential source of competitive advantage?
Thank You.