

# WOM is more offline than online

The visibility of brand buzz in social media has caused too much attention to be paid to online word-of-mouth when real-life chatter accounts for 90% of all conversations around brands

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**W**ord-of-mouth (WOM) about brands is as old as branding itself. We are social animals, hard-wired to share information about the things we like and that can make our lives better. Throughout the last century, in almost all parts of the world, the steady growth of the consumer society has fuelled the increasing presence of brand names peppered into everyday conversations.

Marketers acknowledged the power that WOM has to shape the fortunes of their brands, but they did little about it: WOM was

like the weather – you knew it was going on outside your window, hoped it would turn out nice, but couldn't do anything specifically to make or change it.

All change with the rise in social media, from the earliest chat rooms through to the explosion of Facebook, Twitter, Pinterest, Andtherest. Now, suddenly, you could see what people were saying about you, and understand better how the right kind of buzz could give your brand a huge lift. And without spending a cent or penny – why, some brands and businesses seemed to be built on WOM alone. Cue cuts to traditional advertising budgets and a headlong dash into social media marketing and measurement.

Yet Facebook, and its social media kin, represent merely the tip of the social iceberg. Our research consistently shows that over 90% of consumer conversations about brands and companies still happen in the offline world, including over three-quarters that happens face-to-face.

Real-world word-of-mouth still packs a big punch, and yet it is still being, in effect, ignored by many brand owners, who instead focus on building and measuring social media buzz, purely because social media is easier to see and measure. Because social media is sexy and marketing executives are convinced they must embrace it. And, perhaps, because social buzz appears easier to stimulate and influence – just sprinkle a few seeds into Facebook and start counting those posts, shares, and Likes.

Social media buzz is undoubtedly worth monitoring, as an early warning system and as a customer relationship tool. But online social media should not be any brand's primary social channel. Indeed, many product categories – food and drink, beauty and household products, children's and health products – are rarely discussed in social

media, but are frequently so in real life. Other product categories, such as technology, travel and cars, are a better fit for social media, but even here the volume and impact of offline WOM is much greater.

Let's take Dell as an example. Dell has an impressive, industry-leading Social Listening Command Centre, monitoring and, where appropriately, responding to 25,000 posts a day from around the world.

That's a big number – but not that big. In TalkTrack® Britain, our continuous tracker of all forms of WOM, around 3% of UK adults (aged 16-69) recorded a conversation about Dell in the past 24 hours. That's comfortably over a million people discussing Dell in the UK alone every day. On this scale, it's easy to see that buzz really can, and does, have an impact on brand health – positive and negative.

Yes, a fraction of these conversations – 2% in fact – take place in social media, which is still a five-figure sum, in line with Dell's own counts. But they are outnumbered by huge numbers of conversations face-to-face, on the phone and even by email, none of which social media listening can shed light on.

Look at it another way. Despite the hype, not everyone uses social media – around 56% of UK adults do not, according to the IPA's recent TouchPoints study. And users spend around 57 minutes a day in social media – which leaves 23 hours a day to talk about all sorts of things in all sorts of other ways. And people do talk about brands in real life – in their homes, at work, in the pub, on the bus – just as they always have. For many users, social media is for sharing photos and personal news with friends and family, more than it is a channel for sharing consumer experiences and recommendations.

The sheer volume of offline WOM is one reason why its impact is significant, and often



#### CASE STUDY: JOHN LEWIS

To those familiar with the department store, it's probably no surprise to learn that John Lewis gets great WOM among the British public. Almost four times as much brand buzz as rival House of Fraser, for example, despite having considerably fewer stores. Sentiment in those conversations is generally very good – 80% of buzz is positive, well above the average for retailers and all brands.

Much of the buzz comes from the over-35s, and, not surprisingly, offline channels are dominant. The telephone is actually a key mode (as younger consumers embrace social media, it is actually the phone rather than face-to-face that is losing WOM share disproportionately).

What's the secret of its success? There was that cute TV ad at Christmas, a YouTube hit – though John Lewis put plenty of media spend behind the campaign and were not reliant on viral success alone. Our data shows that John Lewis WOM increased by over 40% during Christmas

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2011, and that ad did drive many positive brand conversations – on and offline.

But some retailers got even bigger Christmas buzz uplifts. That's not because that TV campaign was unsuccessful, but because John Lewis gets strong WOM all year round – the Christmas campaign was building on an already-strong foundation. Likewise, many conversations about the brand reference other marketing activities, especially its website and much in-store and POS activity (though not social media). Alongside the award-winning campaigns, John Lewis is quietly delighting visitors to its stores and website. So a high proportion of John Lewis conversations are sparked by a positive experience of the brand – and our data shows that brand recommendations based on direct experience from someone you know well are especially credible and impactful.

John Lewis' strong consumer advocacy is clearly not a Facebook-only phenomenon. The team behind its big campaigns deserve much credit, but so do its merchandising, web, in-store and tactical marketing teams.

much greater than that in social media. But the key to understanding the dynamics of buzz is to realise that it's not just a numbers game. Online and offline are different in character in a number of ways – once again affirming the need to monitor and

harness both. According to recently released research, 'Multichannel Word-of-Mouth: The effect of brand characteristics', when people choose to post things about brands online, they tend to do so primarily as a form of social signalling – what it says about them

as an individual is a very important factor in their decision to post. Do I have something to say about a cool, new, hard-to-get new product, or am I travelling to a place that will impress people? When people talk face-to-face, social signalling is not too

important, but, rather, emotional factors are the primary driver – excitement, awe, disappointment or anger. So for brands, they need to decide, does their story fit the social signalling driver, in which case online social media might well have a role to play; or is the story they expect consumers to tell more one associated with emotions, in which case offline is the way to go.

Offline conversations are also less polarised. Many brand experiences are ‘pretty good’ – worth discussing in the office after you’re just back from a quick trip to Tesco, but maybe not so earth-shattering that it warrants a Facebook post (although we’ve all got a handful of friends who seemingly feel compelled to log every detail of their lives online, those people are, thankfully, a small minority). The net result is that offline WOM for many brands is more positive, with less ‘I’m going to make a point’ posturing and spleen-venting.

Our data shows that the dynamics of WOM differs in other ways. As you would expect, buzz in social media comes largely

recommendations for brands that delivered superior satisfaction. We find that they happen most effectively when nurtured, encouraged, and amplified by marketing activities. In the UK, half of all brand conversations specifically reference a brand’s media or marketing activity. Analysis by Universal McCann, ‘Advertising worth talking about’, confirms that media activity does raise brand WOM volume above its ‘natural’ level (every big brand gets talked about to some degree).

Which media motivates conversation? In fact, TV commercials (7%) and TV programmes (7%) spark more brand conversations than any other form of media or marketing, followed by brand websites (6%), then in-store activity (5%) and product packaging (5%), and retail websites (4%) and internet ads (4%). Online consumer reviews (3%) only come eighth in the list.

Every form of marketing can drive word-of-mouth. And digital media’s impact extends beyond social media – three-quarters of brand conversations that



Courtesy of Dell Inc

Think we’re missing the point about social media? Paul Adams, who is brand experience manager of Facebook, says: “You need to re-orient your business around people, not technology. Don’t have a Facebook strategy, or a Twitter strategy or Foursquare strategy. Map to human behaviour and not to technology.” We couldn’t agree more. Start with people and understand how, why, and where they talk about your brand and use that information to set your strategy, rather than starting with the tools and technologies.

So, if your social strategy should not be driven mainly by the online social media channel, what is the key to generating buzz? Media spend helps, but there’s no single, magic bullet. Most examples of strong buzz have at their heart a strong brand proposition or executional element that gives people something to talk about – in other words, strong creative allied to a relevant brand message. It’s also important to target the people most apt to talk about your brand (usually, your current customers) and to do so in a time and place that lends itself to sharing, especially face-to-face.

All media can be social, if the strategy is sound and the plan sets as a primary goal, to drive word-of-mouth. And if you want to know if your brand is being talked about positively in great volumes by its core targets, then WOM measurement must be taken seriously. Listen and learn about all brand conversations, and don’t rely on the convenient and easy-to-read.

## “Brand owners are rainmakers and have the tools at their disposal to stimulate buzz, not just monitor it”

from younger people (two-thirds of it from those under 34), which is a concern if youth is not especially your target. Upscale consumers also seem a little more selective about using social media – the proportion of buzz which is online tends to be lower among higher-income professionals. And offline WOM is more mobile (at the moment) – nearly half of brand conversations take place outside of your own home, and very few of these are via social media. In a nutshell, online and offline WOM are different, and the sheer amount of offline WOM means holistic measurement is a must.

But as we noted at the start, measurement is only one part of the story. Brand owners are rainmakers, and have the tools at their disposal to stimulate buzz, not just monitor it. Face-to-face conversations are not merely spontaneous

reference social media take place offline – so any ROI assessment for digital or viral campaigns that focus on online metrics, such as Likes, Views and Tweets, is missing the point completely. A strong digital campaign will get people talking in the real world too. Online social media networks have a role to play, but they are just one social channel among many. The primary sparks for face-to-face conversations are elsewhere in your marketing toolkit.

These findings lead us to an inescapable conclusion: word-of-mouth is an outcome of marketing activities, more than it is a ‘social channel’ to be added to the marketing mix. While there’s no harm in treating online social media as its own, unique channel, marketers should not ignore the opportunity of driving word-of-mouth outcomes through all their marketing and advertising activities.

 more on word-of-mouth marketing at [www.warc.com](http://www.warc.com)