Apples and Oranges

DOES A WEB SURVEY PRODUCE SIMILAR RESULTS TO SOCIAL MEDIA TRACKING?

By Christian Bourque, Rick Hobbs and Danielle St. Hilaire

Social media measurement (SSM) is slowly becoming a new research tool available to market research providers and buyers. Looking at social media for insight into consumers' thoughts and perceptions has tremendous potential. The text generated by social media is mostly unmoderated, and contains sincere and genuine reflections on brands and products. Like many researchers, we started using SMM to add value to insights and recommendations, and have found it to be extremely useful on its own merits. When combined with insights from traditional research sources (i.e., surveys), it can be a very powerful tool available to marketers.

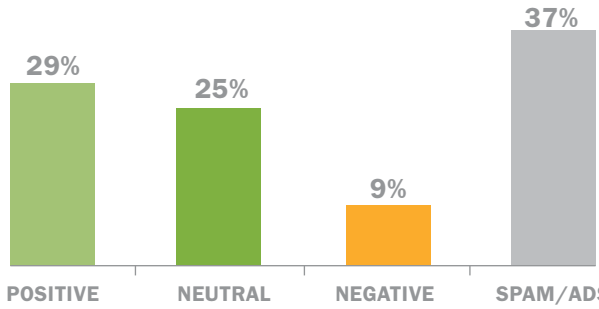
Perhaps because of the newness of SMM, little has been written on how it complements or conjugates with more traditional market research. We asked ourselves if SMM aims to "tap into the conversation" online and if it would provide the same text and subtext as a Web survey on the same variables. And if so, why not replace some of the more standard surveys with SMM?

The first experiment in a series of examinations on social media uses SMM and Web-based interviewing on two very different topics (to control for the content area), using the same keywords to look at similarities and differences in the data obtained. How similar or different will the results be, and what can explain similarities and differences in the data?

Our working hypothesis was that, the more focused or narrow the population, the more similar the results from both methodologies should be. Our study examines two specific types of questions: (1) spontaneous words or issues associated with the topic to see if they match with occurrence measures in SMM and (2) positive-negative opinion questions on keywords associated with a brand or an issue to see if they match with ratings provided by SMM. Does tapping into the conversation yield more, different or better data without asking questions?

The survey was done online with English-speaking Canadians from the LegerWeb panel. To avoid a debate on specific SMM tools, we will leave out the name, but we selected one of the leading products. We examined two different topics, a traditional brand usage and attitudes type challenge (individual on-demand coffee makers) and a public opinion measurement (the Canadian gun registry). In both instances, we found that SMM provides additional and helpful information. However, after 1,200 completed surveys and analysis of more than 10,000 social media entries (2,300 for on-demand coffee makers and more than 8,000 for the gun registry), we determined that, while SMM is complementary to traditional U&A/POR work, it would not, at least for now, be able to replace the traditional survey approach for these topics.

FIGURE 1: SMM SENTIMENT ANALYSIS



Share of Voice and Sentiment

The first study involved a head-to-head comparison between Tassimo, a maker of individual on-demand coffee makers, and a major competitor. The Web survey found that, similar to the market share reality, Tassimo had a 56 percent share and the competitor was at 44 percent. When looking at the share of voice on social media, the competitor was outpacing Tassimo four to one. We can infer, then, that the frames of

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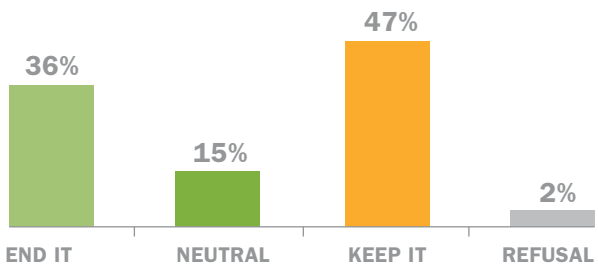
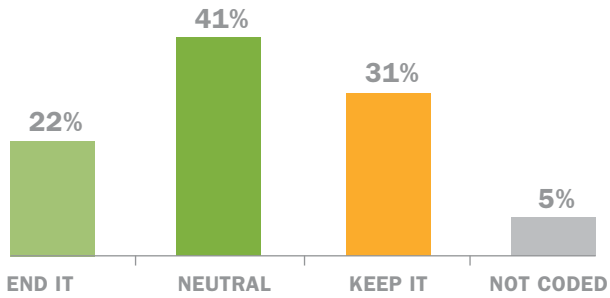
FIGURE 2: A. WEB SURVEY



B. SOCIAL MEDIA



reference were different between these approaches.

Looking at the sentiment analysis was problematic. The first analysis showed that Tassimo had an overwhelmingly favorable rating: 45 percent positive, 47 percent neutral and 8 percent negative. (Excluding the negatives, we can say 92 percent of the comments were favorable.)

However, when we looked at the entries, we found a considerable portion of the neutral ratings could be described as advertising or spam. Manually coding the entries yielded a fairly different picture. (See Figure 1.)

Even after cleaning up the database for spam, we found that the neutral category was not so much neutral sentiment as much as questions and answers. Sixty-eight percent of the neutral categories were questions, such as, "Where do you get more pods?" and 28 percent were answers to those questions. Still, SMM yielded considerably more positive comments overall when compared with the Web survey. The Web survey yielded 12 percent positive, 22 percent neutral, 26 percent "don't know" and 29 percent negative answers.

Even looking beyond the sentiment, the actual comments were different. The No. 1 positive statement about Tassimo from the Web survey focused on the convenience of use; 42 percent reported they were easy to use, more than double those SMM comments (13 percent said machine itself/quality/ease of use and 7 percent said useful).

Why the difference? Social media comments overwhelmingly come from owners. Eighty-two percent of data is generated by users of Tassimo, compared to only 8 percent in the Web survey. So, depending on the incidence of ownership for the product, scraping SMM may be a very economical way of getting at the thoughts, hopes, dreams, fears and needs of users.

How do SMM and Web surveys relate to each other when the debate is about choice and not really sentiment? It is closer than one might think, once you get past the issue of positive; and negative. In a public policy environment, what is "positive" and "negative" is often in the eye of the beholder. For some, a strong argument for ending a policy may be positive; others might express themselves sarcastically as a way of being critical of the policy or may use more complicated language.

When we asked survey participants if they were in favor of keeping legislation that requires all long guns (rifles, shot guns, etc.) to be registered, 47 percent replied that they wanted to keep it, 36 percent wanted it ended and only 17 percent were neutral or refused to answer. It was a fairly polarizing question. Surprisingly, the social media environment, an environment where many seem less concerned about speaking their mind, was less polarized. A full 41 percent of comments were neutral. (See figure 2.)

The types of comments were similar when looking at those who wanted to end the policy. Forty-six percent of comments related to ending the policy on social media were related to a waste of money, and the leading comment from the Web survey was also related to a waste of money at 31 percent. Political comments started coming through on the social media scrape with smaller percentages but were still higher compared with the Web survey.

FIGURE 3:

WEB SURVEY

	TOTAL
All guns should be registered	55%
The National Gun Registry was created for a reason	22%
Guns are / Guns kill people	16%
The National Gun Registry is important for law enforcement	6%
We are not the United States / We should not have gun laws like those in the USA	2%

SOCIAL MEDIA

	TOTAL
All guns should be registered	55%
Registry saves lives	22%
Relieved it was saved	16%
Not a threat to freedom	6%
I hate guns	2%
Prevents suicide	6%
Need to keep it (general)	5%
Police say we should keep it	3%
Other	11%

Executive Summary

Social media measurement (SMM) is a useful research tool that yields powerful results for market researchers when combined with insights from traditional sources, such as surveys. However, SMM has certain limitations and, as it stands now, cannot replace current research practices. Depending on the objectives of the researcher, SMM cannot take the place of a standard U&A or POR survey and should instead be treated as one of several tools in the researcher's toolkit.

On the flip side, those who were in favor of keeping the legislation (status quo) were more likely to bring in politics right away on social media. Looking at the coded open-ended data, it was hard to see how motivations for keeping the registry were the same. The top mention from SMM included comments that were critical of the political party in favor of dropping the registry, not even necessarily because of this specific policy. For example, one comment simply noted that the registry was "typical wedge politics from the Tories; hope they never get a majority." Yet these sentiments were never really expressed by respondents of the Web survey.

Challenges and Potential

One of the biggest challenges in comparing apples and oranges (Web survey and SMM) is that the frame of reference is not the same. A traditional quantitative study is done over a period of a week or two and is somewhat artificial in that the researcher "forces" people to think about things they may not be overly concerned about. A social media scrape can be taken from deeply engaged individuals, but there are a lot of ads and questions to weed out. There are challenges in measuring social media over time as well, including often difficult-to-understand environmental impacts that play into comments and blog topics. Traditional surveys are able to control timing and therefore have a better understanding of external factors.

One of the most challenging factors in comparing data is that the socio-demographic characteristics from the SMM data are often unknown and indeterminable. Even in cases where it can be found, it takes considerably more time and effort than simply taking the information from your panel profile. As a result, it is difficult to understand if differences are the result of socio-demographics.

The data provided by these two approaches are sufficiently different from each other that both surveys and SMM are

likely necessary for deep data digs. The Web survey open-ended responses tended to be more generic about the brand or perceived benefits and the SMM comments tend to be more about using the product.

Using a traditional survey still allows more flexibility in asking specific questions, such as aided or unaided awareness among users and nonusers, brand attribute scales and the very helpful probe, "Why do you say that?"

Data source is still difficult to track. For example, with regards to comments on gun registry in Canada, it is hard to answer the question: How many of them actually started in Canada and how many were from the United States? While for products data source may not matter very much, it can be critical for social and political questions. For example, the issue of gun registry is likely to be much less an emotional issue in Canada than it is in the U.S., where the right to bear arms is guaranteed by the Constitution.

On the basis of these findings, we believe SMM to be a very useful tool that yields powerful information. However, it does not replace current research practices and should be treated as another tool in the researcher's tool kit. Depending on the objectives of the researcher, SMM may be more or less helpful, but SMM, as it stands now, cannot be used to replace a standard U&A or POR survey. Certainly, we understand why a researcher would and should tap into this vast reservoir of non-moderated data. There should be no question as to the potential, but as with any methodology, there are important limitations. **MR**

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